Account Administration

Overview

InfoPortal 3.0's capability to create "Extranets" (known as Prospect Nets or Partnernets, depending on which version of InfoPortal you have) or secure, individualized websites, is controlled from the Account Administration mode.

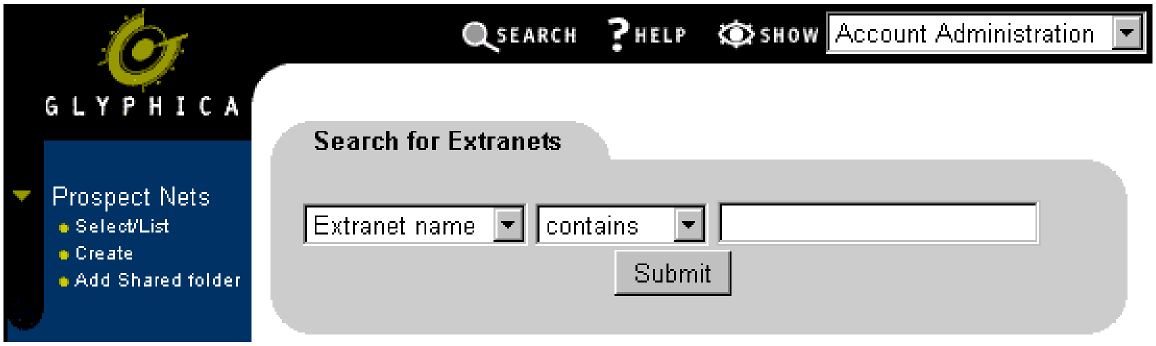
The function of the Account Administrator is to create, modify, and control each of these extranets, and to give rights to those extranets to the appropriate users, both within and outside the organization. For InfoPortal 3.0/Sales Edition, the use of these ProspectNets allows the account manager and the prospect evaluation team to collaborate throughout a long sales cycle from presenting the early presentation and collateral, to working together on RFPs, to negotiating the final contract. Both parties can add documents and content securely and privately. InfoPortal allows them to conduct threaded discussions and dialogue about specific topics, specific documents, and about the overall proposition. In InfoPortal 3.0/Marketing Edition, the PartnerNets allow joint collaboration between your company and your partners; with document routing, discussion areas and shared document control.

There are two functional roles accessed by the Account Administration mode. The first is that of the Account Administrator. The second is that of the Account Manager. The rights to these roles are set by the System Administrator.

Table 2:

Role	Functions
Account Administrator	Account Administrators can: • Create new Extranets • Modify existing Extranets that they created • Modify existing Extranets to which they have been granted rights. • Share documents between Extranets. • Remove Extranets they created or to which they have been granted Account Administration rights.
Account Manager	Account Managers can: • Modify (interface and documents) existing Extranets to which they have been granted rights.

When you select Account Administration from the Show drop-down list, the Account Administration view displays:



Interface Description

The Account Administration view contains the following areas:

- Side Navigation Bar
- Top Navigation Bar

Account Administration Side Navigation Bar

Menu items that contain a submenu display a green triangle to the left of the menu name. Initially the Side Navigation Bar contains one menu, the Prospect Nets menu. After an Extranet is created, the Extranet title displays in the Side Navigation Bar along with additional menu items, which are described later in this chapter.

Account Management Side Navigation Bar

The Account Management view contains a subset of the Account Administration features. Account Managers cannot create or remove Extranets, nor can they add a shared folder to the Extranet. Otherwise, the functionality is the same as for Account Administrators.

When you select Account Management from the Show drop-down list, the Account Management view displays. Initially, the Side Navigation Bar looks like this:

The following sections describe the menu and submenu items in the Side Navigation Bar. The following tables list the menu links in the Side Navigation Bar, a description of each link, and where you can find the related tasks for step-by-step instructions.

Prospect Nets Menu

Menu Item	Description	Associated Tasks
Select/List	Displays the Search for Extranets screen, where the Account Administrator/Manager can search for existing Extranets by Extranet Name or Extranet ID.	“Finding an Extranet,” page 5.20
Create	Displays the Create Extranet screen, where the Account Administrator can create an Extranet, configure its features and add users and groups. (This feature is not available to Account Managers.)	“Creating an Extranet,” page 5.6
Add Shared Folder	Displays the Shared Documents window, where the Account Administrator can create a folder to share with all other Extranets on the InfoPortal. Once the Shared Documents folder is created, the Account Administrator can add documents to it using the Shared link in the Documents menu. (This feature is not available to Account Managers.)	“Creating a Shared Documents Folder,” page 5.23

After an Extranet is created, the Extranet title displays in the Side Navigation Bar along with the following additional menus for Account Administrators:

- Edit
- Documents
- View As
- Activity
- Info
- Remove
- Send Mail

Account Managers do not see or have access to the Remove function.

Edit Menu

Menu Item	Description	Associated Tasks
Details	Displays the Create Extranet screen, where the Account Administrator/Manager can edit the information for a selected existing Extranet.	“Editing the Extranet Setup,” page 5.25

Menu Item	Description	Associated Tasks
Banner	Displays the Edit Banner screen, where the Account Administrator/Manager can place a banner in the top center of the Prospect Net. The banner can be any image file containing any text or image. Text can be added below the banner, and can be formatted using HTML tags. This text is automatically saved in a file named banner.txt, which is stored in the Extranet's Private folder on the InfoPortal.	"Creating an Extranet Banner," page 5.30
News	Displays the Edit News screen, where the Account Administrator/Manager can add a message, news, or an important point to the main page of the Prospect Net. The text can be formatted using HTML tags.This text is automatically saved in a file named news.txt, which is stored in the Extranet's Private folder on the InfoPortal.	"Edit News," page 5.39
Logo	Displays the Change Logo screen, where the Account Administrator/Manager can insert a logo image in GIF or JPEG format. This image will appear in the upper right-hand corner of all pages in the Prospect Net. This image is automatically saved in the Extranet's Private folder on the InfoPortal. In addition, the path to the image is saved in a file named logo.txt, which is also saved in the Private folder.	"Adding a Logo to the Extranet," page 5.41

Documents Menu

Menu Item	Description	Associated Tasks
Shared	Displays the Shared Documents screen, where the Account Administrator/Manager can select InfoPortal documents that can be shared if desired with all the Extranets on the InfoPortal.	"Sharing Documents," page 5.47
Custom	Displays the Custom Documents screen, where the Account Administrator/Manager can select InfoPortal documents that will be whon only in the selected Extranet.	"Custom Documents," page 5.49

View As Menu

Menu Item	Description	Associated Tasks
Manager	Displays the Extranet contents in a hierarchical structure of category folders and documents. It is similar to the Content Publishing view, except that this view shows *only* the selected Extranet's contents.	"Viewing the Extranet Directory," page 5.51
Customer	Displays the screen exactly as external users will see it when they log into the Extranet.	"View as Customer," page 5.52

Activity Menu

Menu Item	Description	Associated Tasks
Activity	Displays the Extranet Activity screen, where the Account Administrator/Manager can monitor documents uploaded, modified, and viewed on the Extranet main page.	"Monitoring Extranet Activity," page 5.53

Info Menu

Menu Item	Description	Associated Tasks
Info	Displays the Prospect Information screen, where the Account Administrator/Manager can view and change the profile information about the company for which the Extranet was created.	"Viewing a Prospect Profile," page 5.21

Remove Menu

Menu Item	Description	Associated Tasks
Remove	Displays the Remove Extranet screen, where the Account Administrator can remove all files under the content root—for example: /extranet/WestCom. (This feature is not available to Account Managers).	"Removing an Extranet," page 5.55

Send Mail Menu

Menu Item	Description	Associated Tasks
Send Mail	Displays the Mail screen, where the Account Administrator/Manager can select users of that Extranet and automatically address emails to them.	“Sending Mail to Extranet Members,” page 5.56

Account Administration/Management Top Navigation Bar

See “Top Navigation Bar,” page 1.3 for a description of the Top Navigation Bar.

Account Administration/Management Tasks

The Account Administrator's major function is to create and administer Extranets in the system. The Account Manager’s role is the same as the Account Administrator’s, with the exception of creating/deleting Extranets and adding a Shared folder. Only the System Administrator can grant either Account Administrator or Account Manager rights to users.

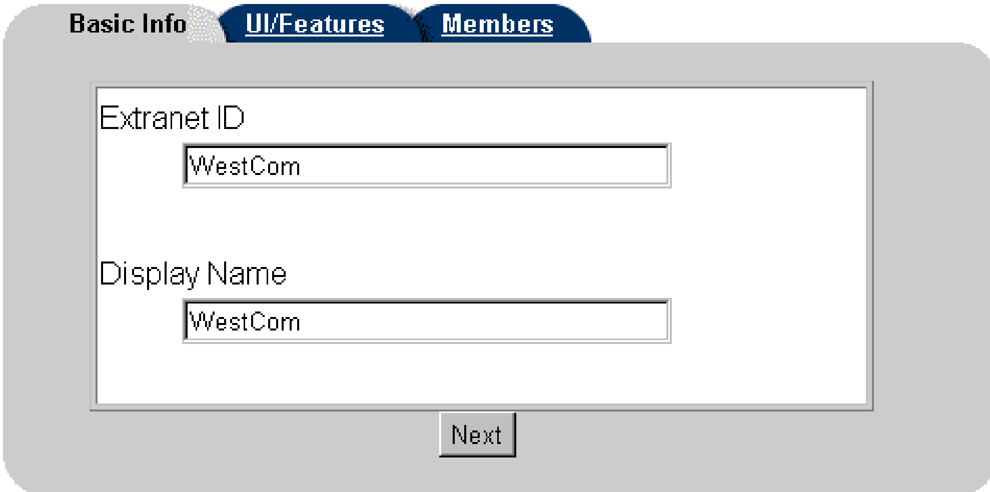
Creating an Extranet

The Extranet Wizard allows Account Administrators to quickly create Extranet sites for specific user constituencies, with customized access and functionality. These Extranets can be used to communicate directly with customers and to exchange information with clients. They are secure, controllable subsections of the overall InfoPortal, and can be searched by Content Publishers as part of the overall content of the system—but Extranet users can see only the content in the Extranet.

(This feature is not available to Account Managers.)

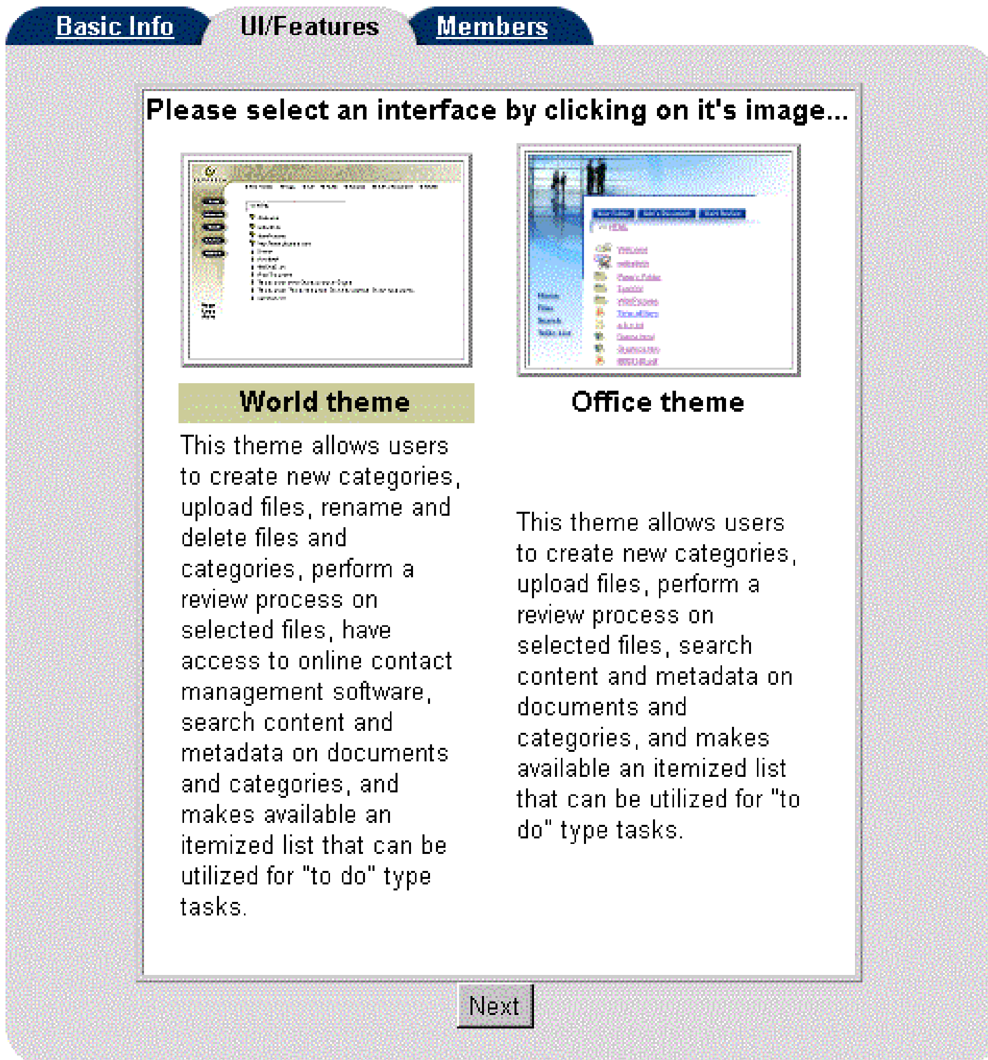
1. Click on the Extranet menu.
2. Click on the Create link in the Prospect Nets menu:

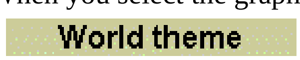
- The Basic Info tab of the Create Extranet screen displays:



3. Enter the Extranet ID. This cannot contain spaces or odd characters. Use underscores to separate words in the ID.
4. Enter the Extranet name that will display in the system in the Display Name field. Try to keep this under 30 characters for display purposes; there is no actual limit on the length of the Display Name.

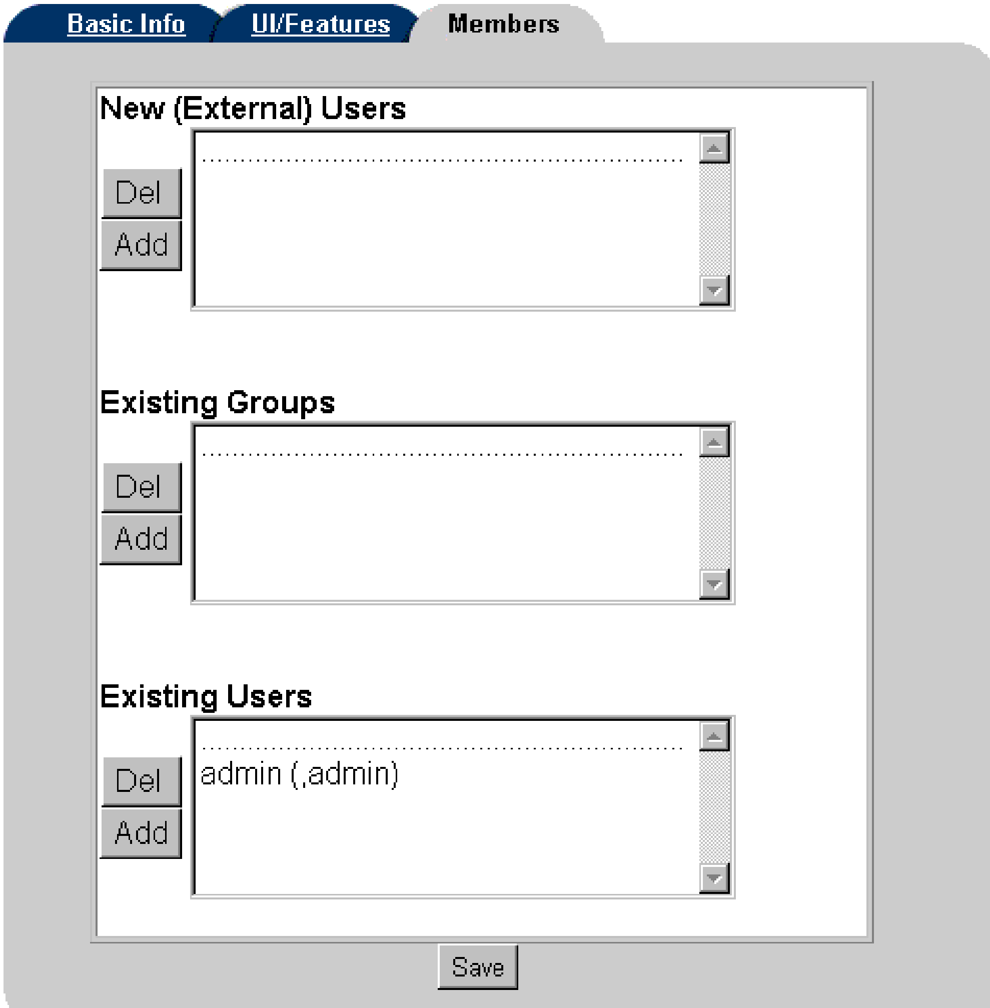
5. Click on Next.
   - The UI/Features screen displays:



6. Click on the appropriate graphic to select Theme 1 or Theme 2.
   - A list of features included in each theme is listed below the graphic to help you make your choice. When you select the graphic, the theme title highlights to show it is selected: 

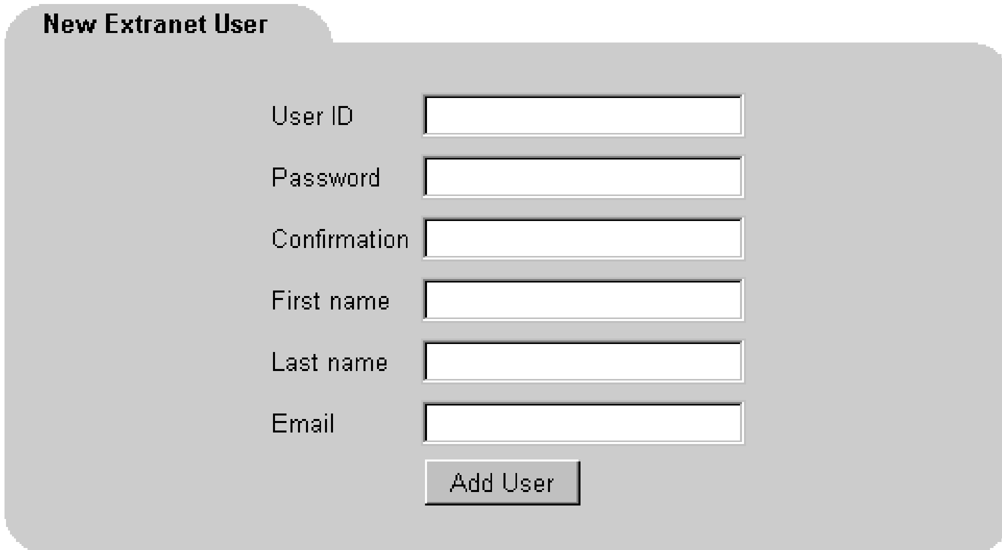
7. Click on Next.

- The Members screen displays. This screen allows the Account Administrator the ability to add existing system users to the "group" created with the new Extranet, and/or to add new users from outside the company so that they can have access.

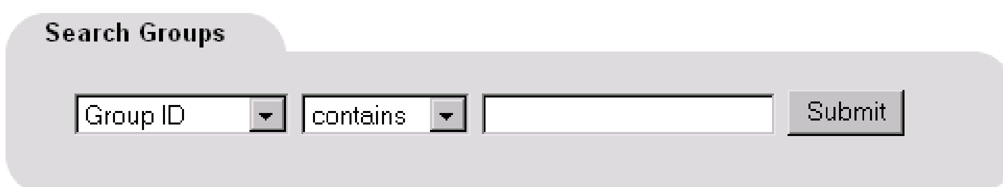


8. If you wish to add a new user to this Extranet (one that does not already exist in the system), click on the Add button under New (External) Users.

- The New Extranet User screen displays in a separate window:

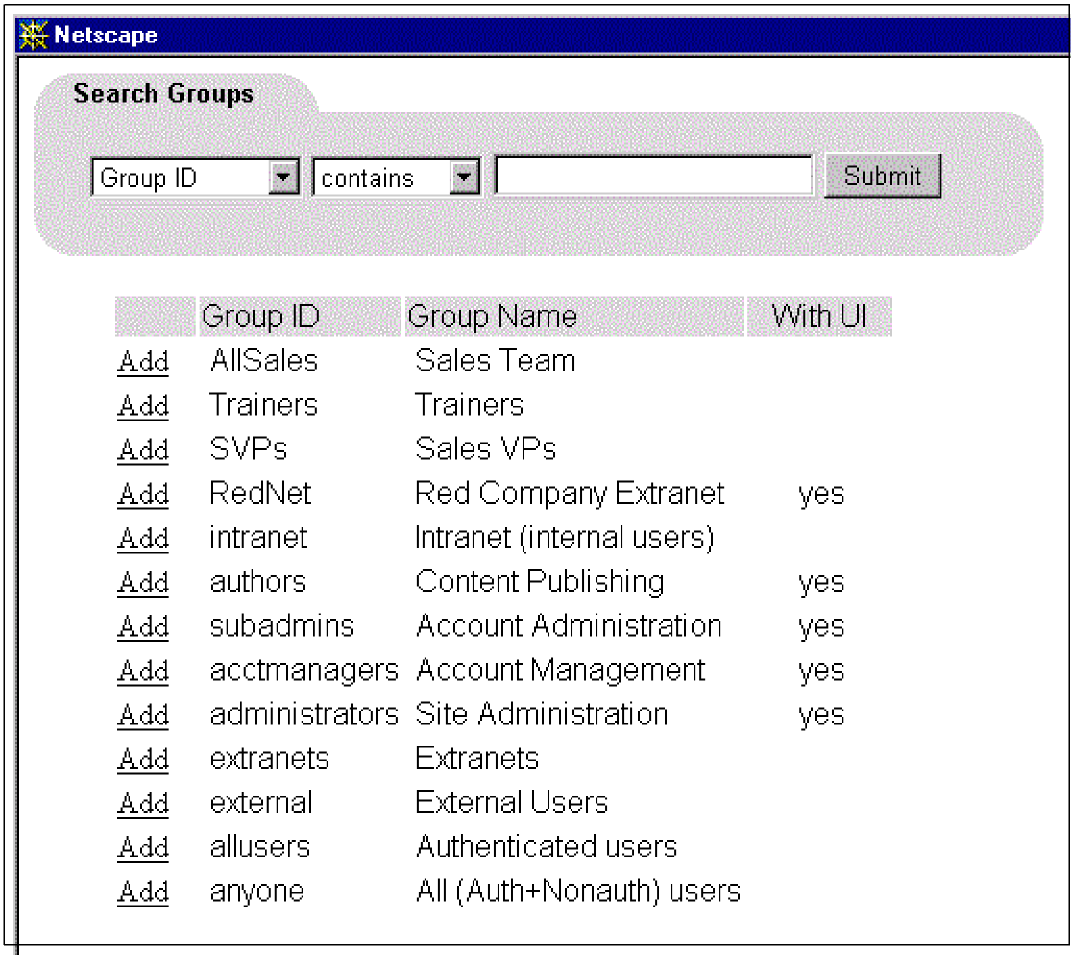


9. Enter the user information in the appropriate fields. **All fields are manditory**.
10. Click on the Add User button.
11. Repeat Steps Step 9 and Step 10 for each new user.
12. Click on the close button to close the New Extranet User window.
    - The user names display in the New (External) Users list in the Members tab.
13. If you want to add one or more existing groups as members of the Extranet, click on the Add button under Existing Groups.
    - The Search Groups screen displays in a separate window:

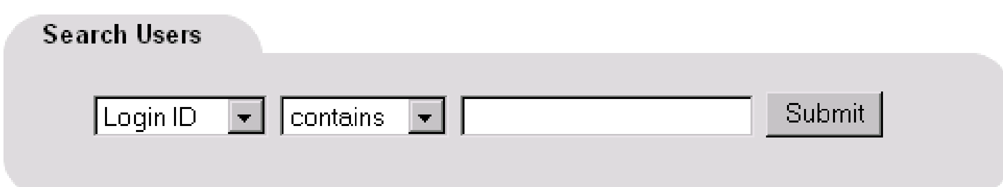


14. Enter your search criteria.
15. Click on the Submit button.

- The search results display:

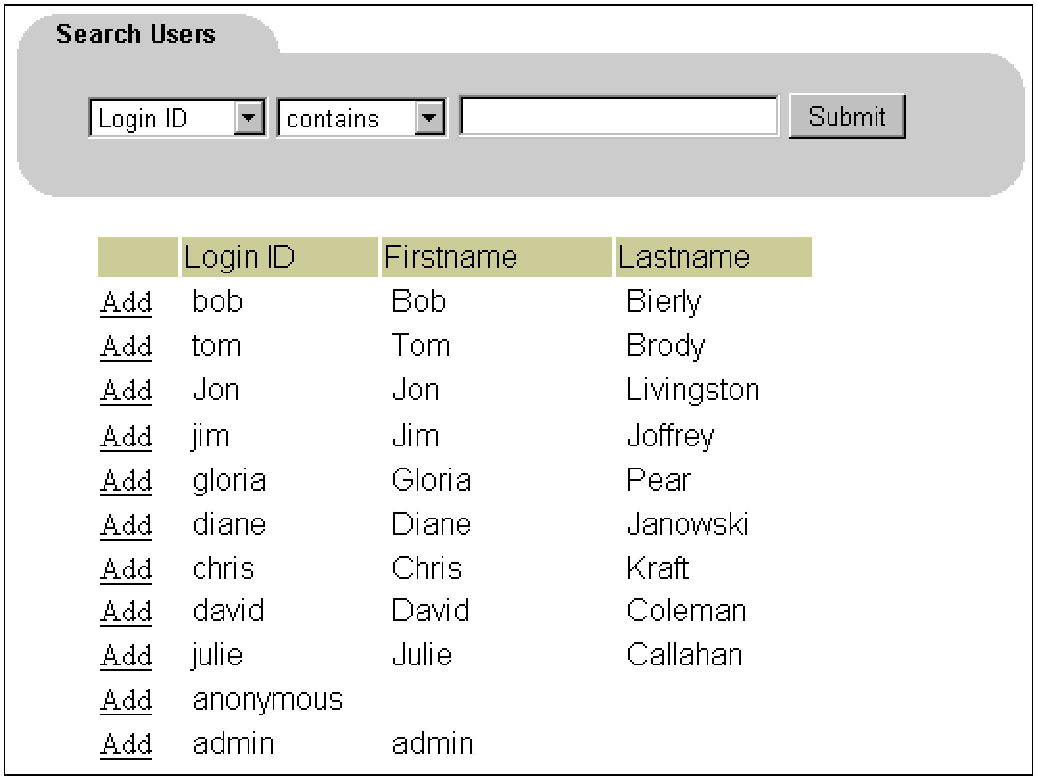


16. Click on the Add link for each user you want to add.
17. Click on the close box ☒ to close the Search Groups window.
    - The group names display in the Existing Groups list for the Extranet.
18. If you want to add one or more existing users as members of the Extranet, click on the Add button under Existing Users.
    - The Search Users screen displays in a separate window:



19. Enter your search criteria.
20. Click on the Submit button.

- The search results display:



21. Click on the Add link for each user you want to add.
22. Click on the close box ☒ to close the Search Users window.
    - The user names display in the Existing Users list for the Extranet.
23. Click on the Save button.
    - The Extranet is created on the InfoPortal.

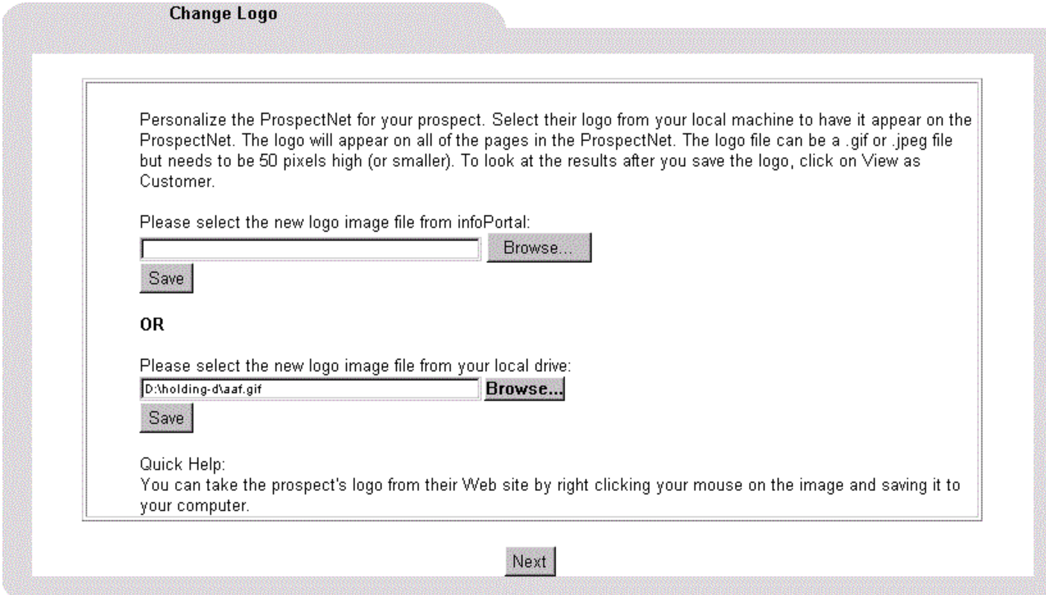
Customizing the Extranet

Once you have saved the users into the Extranet, InfoPortal will lead you through a series of steps to customize the look and content of the Extranet. These can all be modified later as needed. The steps in the process are:

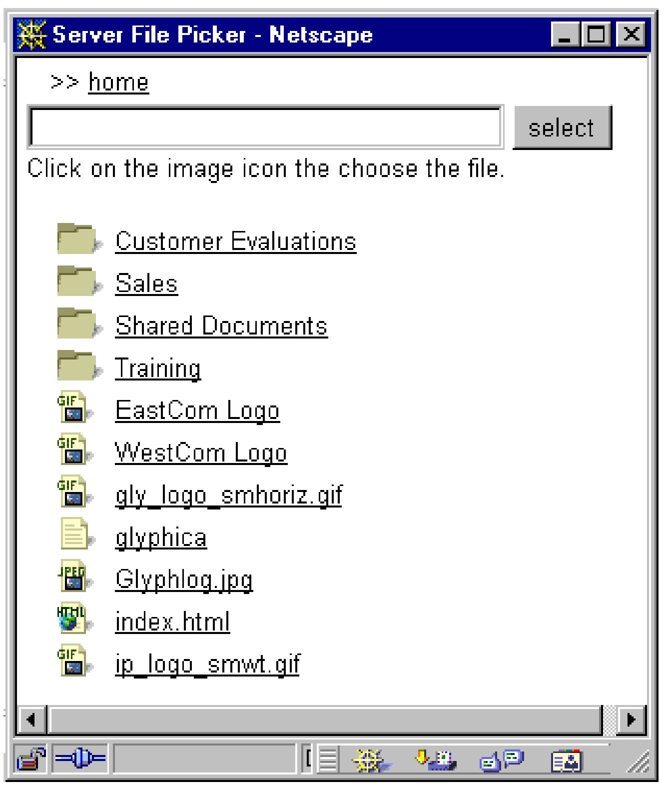
1. Change Logo
2. Edit News
3. Edit Banner
4. Add Discussion Group
5. Add document/Add Multiple Documents

Change Logo

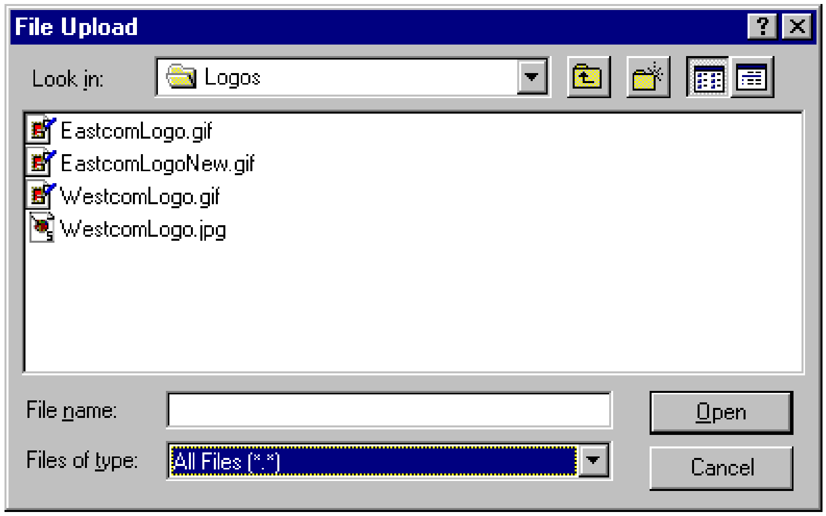
The first screen that displays in the Customizing Extranet process is the Change Logo screen. Logos allow you to display a logo (typically your company's or the client's) in the top right-hand edge of the Extranet site.



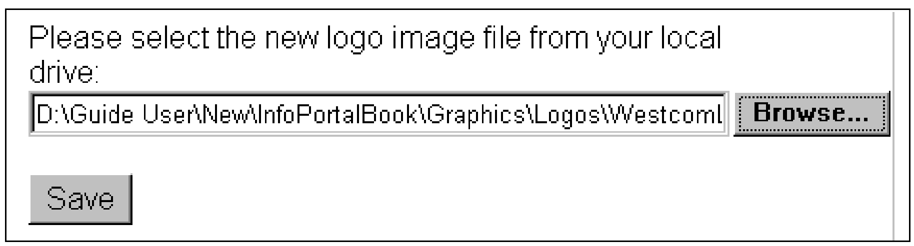
1. Click on the appropriate Browse button, depending on whether you want to selec the logo file from the InfoPortal or from your local hard drive.
   - If you are selecting from the InfoPortal, the Server File Picker window displays:



- If you are selecting from your local hard drive, the File Upload window displays:

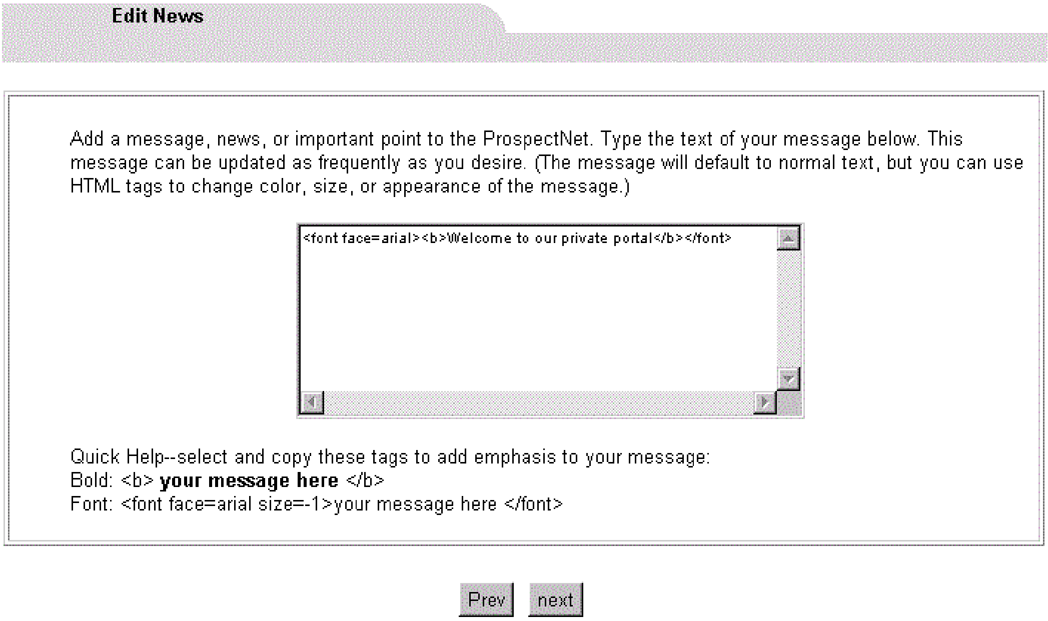


2. Select the logo file.
3. Click on the Select button in the Server File Picker window; click on the Open button in the File Upload window.
   - The path and filename display in the appropriate text box of the Change Logo screen:



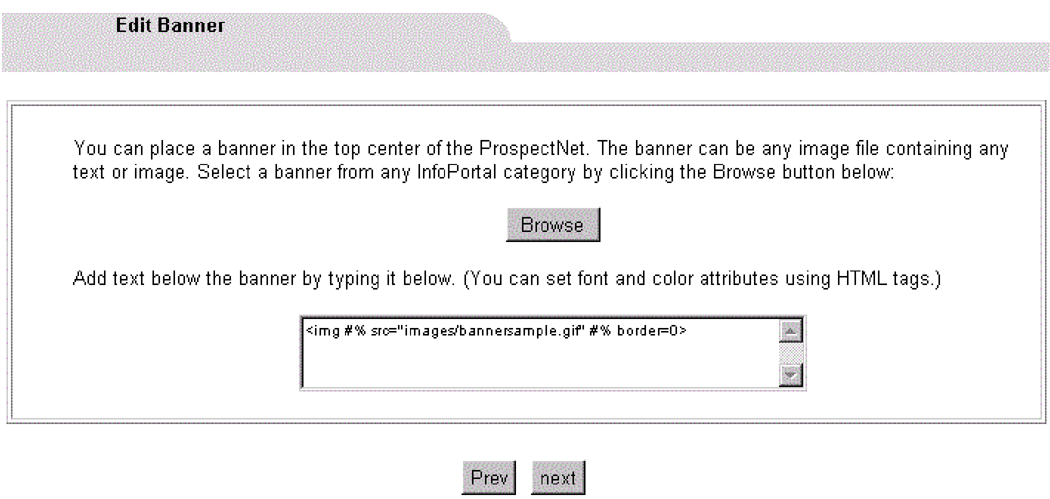
4. Click on the Save button that is below the text box where the path and filename display.
5. Click the Next button at the bottom of the screen. This will take you to the next step in the Create Extranet process.

The next screen that shows is the Edit News screen. News is a message that you can post on the front of the Extranet screen to alert users of new information, or give them basic instructions on using the Extranet.



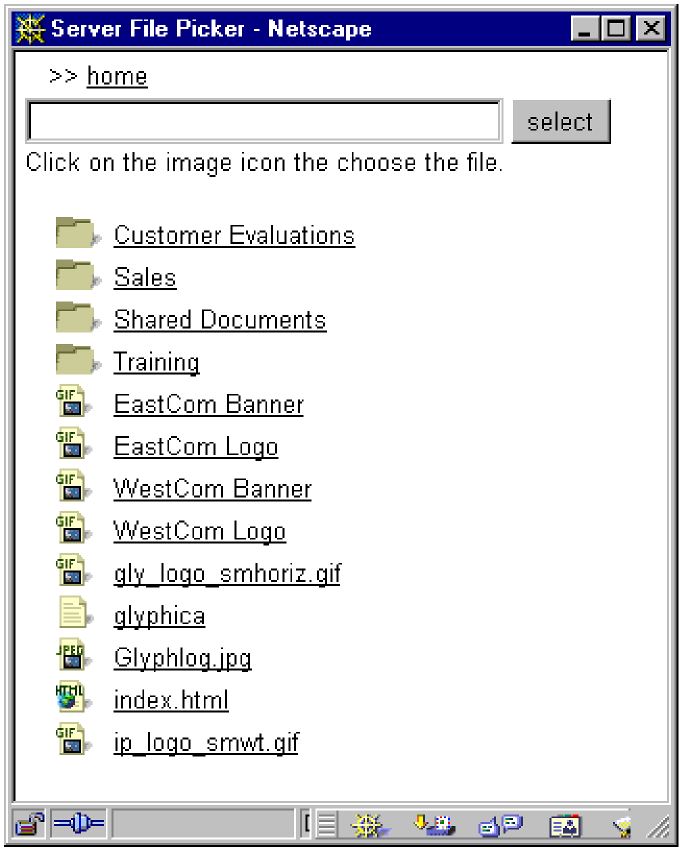
Add any text you wish here. You may use HTML tags in the body of the message to create special effects, such as **bold** or *italic* characters.

The next step in the Create Extranet process is the **Edit Banner** screen. The banner is a centrally-located graphic or other item that can be displayed in the upper-middle section of the Extranet view. You may choose any graphic that is currently available within the InfoPortal collection. Skip this step if no banner is desired.



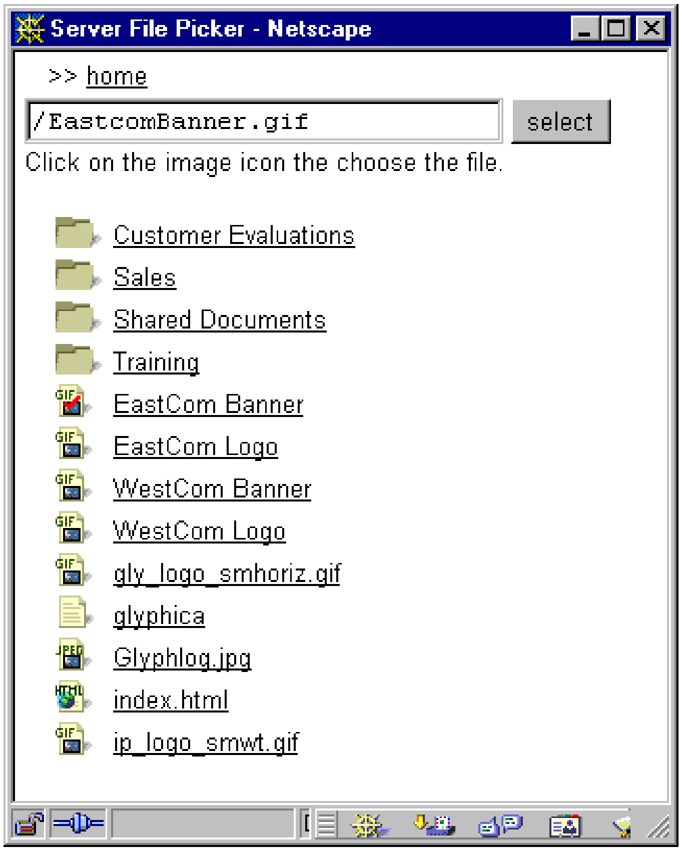
1. Click on the Browse button to select an image file from the InfoPortal.

- The Server File Picker window displays:



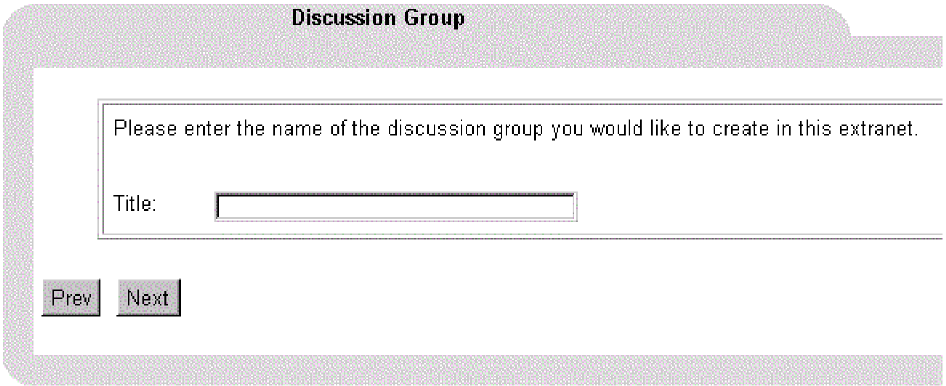
2. Click on the image file icon to select it.
   - Clicking on the title link displays the image.

- The path and filename display in the text box at the top of the Server File Picker window.



3. Click on the Select button.
   - The path and filename display in the text box at the bottom of the Edit Banner screen.
4. To add text below the banner image (or to use text only instead of an image), enter the text in the text box at the bottom of the Edit Banner screen. Enclose this text in HTML tags to get the appropriate formatting.
5. Click on the Save button.
6. Click the Next button to go to the next step in the process.

The next step in the Create Extranet process is adding a discussion group, if desired, to the Extranet. Skip this step if you do not wish to place a discussion group in the Extranet at this time.

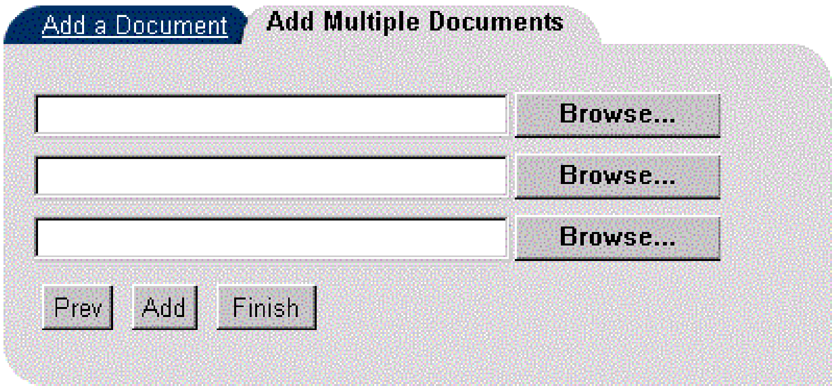


1. Give the discussion group a name. You may not use odd characters or spaces here; separate words in the title with underscores if necessary.
2. Click Next to go to the next step in the process.

The final step in the Create Extranet process is adding documents to the Extranet. These documents will show **where?** in the Extranet view.

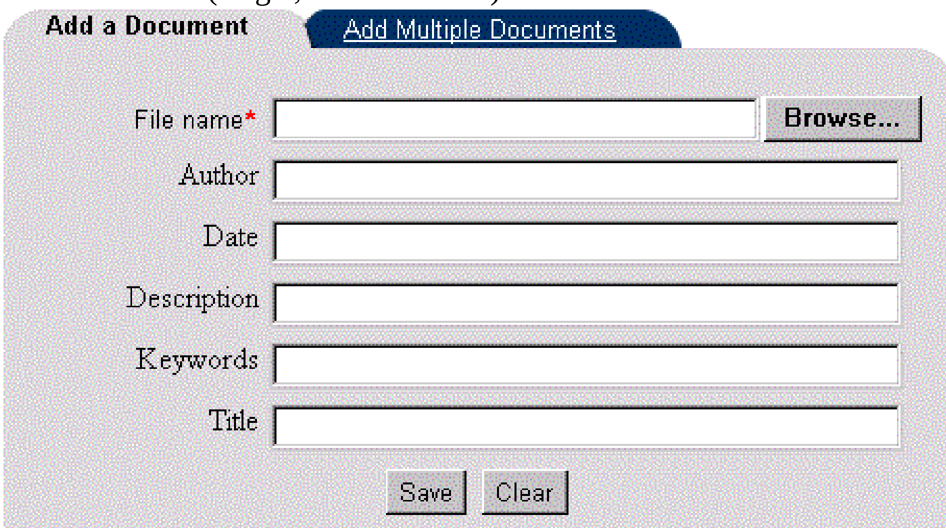
There are three ways to add initial documents to the Extranet. The first is to Add Multiple documents. You may also add a single document, one at a time. The difference is that when using the Add Multiple window, you cannot add metadata, whereas using the Add Document (single) function you may add metadata. The third way is to use Shared Folders or Shared Documents (see section ???).

1. Add Multiple Documents.



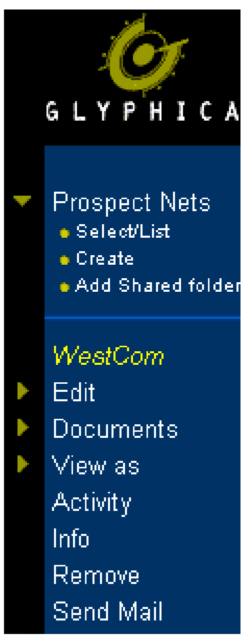
2. Browse to any documents you wish to add from your hard drive or from your local network.
3. If you wish to add three or fewer documents, click Finish to complete the Extranet process. If you wish to add more than three, click Add. The documents will upload and the screen will clear so that you may continue adding documents through this window.

4. Add Document (single, with metadata):

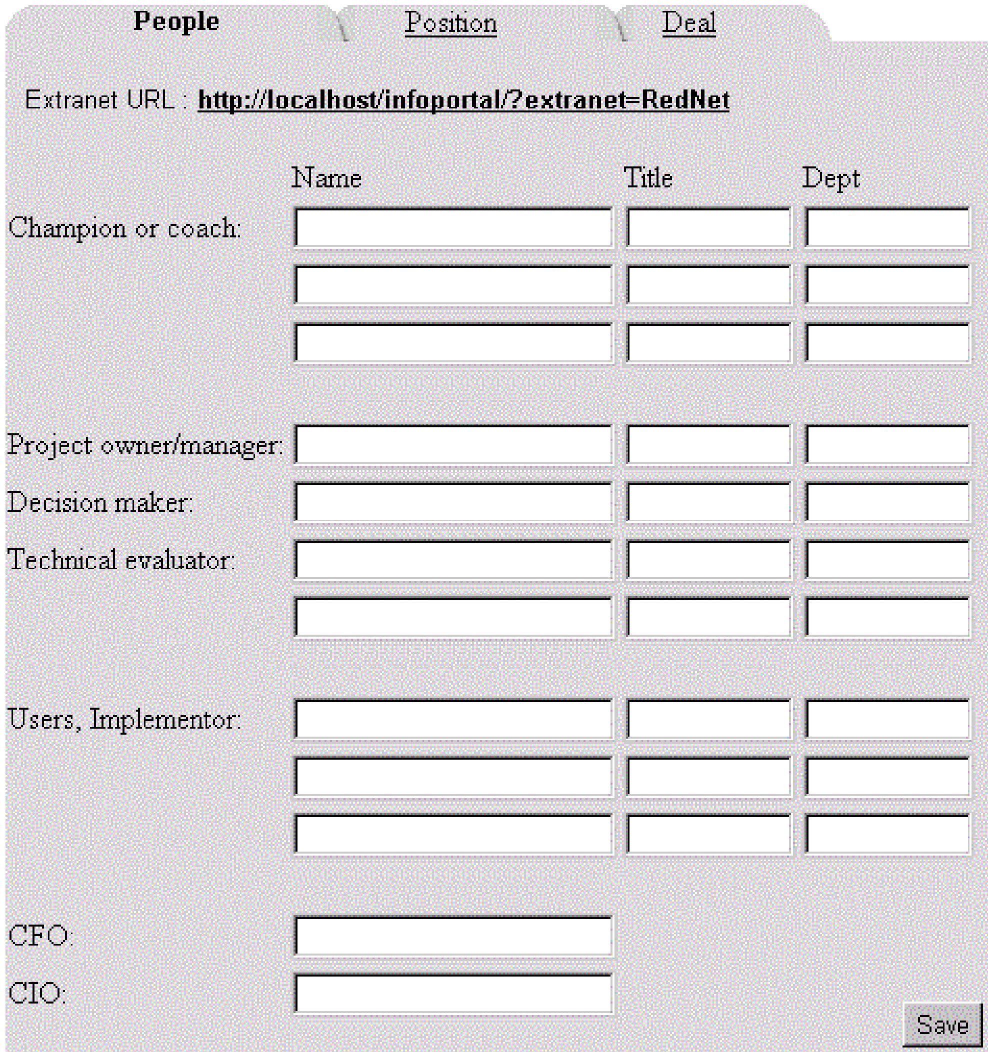


5. Add the document using the browse button.
6. Fill in any metadata as needed.
7. Click Save. Repeat as necessary to upload documents with metadata.
8. When you are finished, return to the Add Multiple Documents screen and click Finish.

- When an Extranet is created, its name displays in the Side Navigation Bar. Additional menu items display so that the Account Administrator can configure the Extranet.



- The Extranet Data screen displays in the Content Area. This is where the Account Administrator enters and maintains profile information on the Extranet company. The Extranet Data screen is divided into three tabs, or sections. The elements that appear in each section may not match those shown, as they may be customized for each InfoPortal implementation. Therefore, only the primary screen is shown here.



Click on the Save button after entering data in the desired fields.

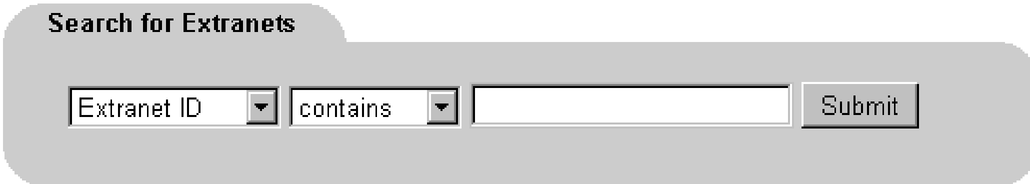
- The prospect company and related information is added to the Extranet.

Finding an Extranet

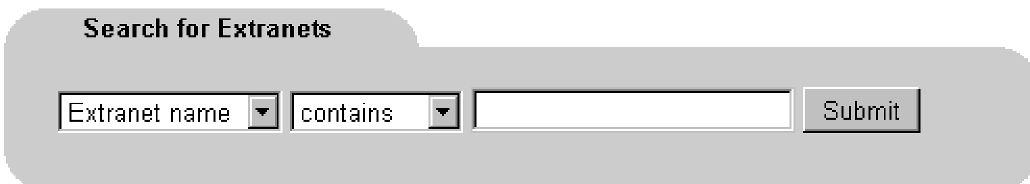
This procedure finds an existing Extranet on the InfoPortal. The Account Administrator/Manager can perform searches using the Extranet ID or Extranet Name and standard search operators.

1. Click on the Extranet menu.
2. Click on the Select/List link in the Prospect Nets menu:

The Search for Extranets screen displays:



3. Enter your search criteria:
   - Clicking on the Submit button, without selecting anything, returns all Extranets in the system.
   - Searches can be created for Extranet ID or Extranet name.
   - The following operators are available: contains, begins with, equals.
   - Wildcards are allowed in the text box. For example, a search on "Wes?" will return Extranets with names such as WestCom or Wesson. An asterisk (*) alone entered into the text box returns all Extranets in the system.
4. Click on the Submit button.
   - The search results display:



Extranet Name	ID
Midwave	(Midwave)
Cohesive Downloads and Collaboration Site	(Cohesive)
MSJ Downloads	(MSJDownloads)
Vendor Net	(Vendor_Net)
Options Link	(Options_Link)

Viewing a Prospect Profile

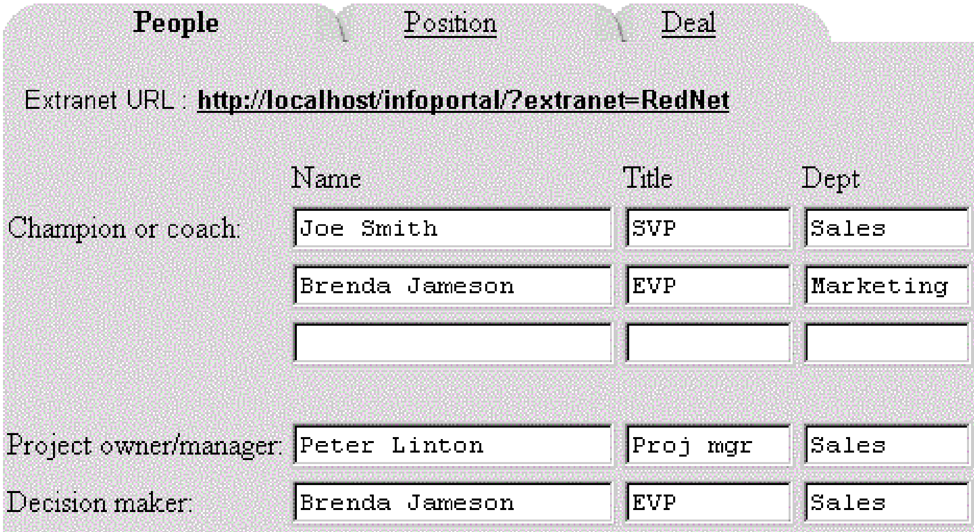
There are three ways to display the Extranet Data screen for an existing Extranet:

- Using Select/List from the Account Administration/Manager view
- Clicking on the Info menu when the Extranet is selected
- Clicking on the Extranet title link in the My Portal Partner Nets window

Using Select/List

1. Find the Extranet using the instructions in “Finding an Extranet,” page 5.20.
2. When the search results display, click on the title link (in the Extranet Name column) for the Extranet you want to view.

3. The Extranet Data screen displays (partial screen shown):

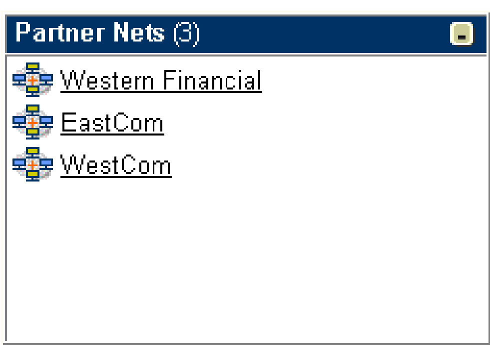


Using the Info Menu

If the Extranet is already selected, click on the Info menu to view the Extranet Data screen.

Using the My Portal View

In the My Portal view, click on the Extranet title link in the Partner Nets window:



This automatically displays the Extranet Data screen for the selected Extranet.

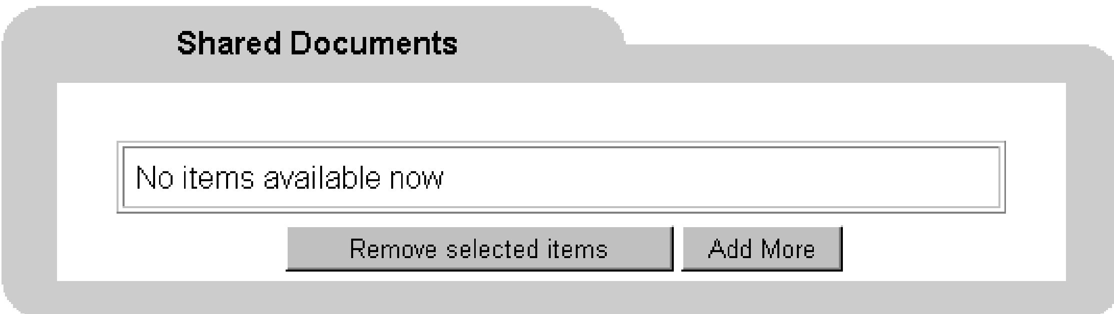
Creating a Shared Documents Folder

This procedure creates a Shared Documents folder on the InfoPortal. This procedure only needs to be done one time. Once the Shared Documents folder is set up on the InfoPortal, the Account Administrator, Account Manager and Content Publishers put documents in this folder to make them accessible by all Extranets on the InfoPortal. This feature saves time and space, since the files to be shared are uploaded only once to a central folder, rather than to separate folders on each Extranet.

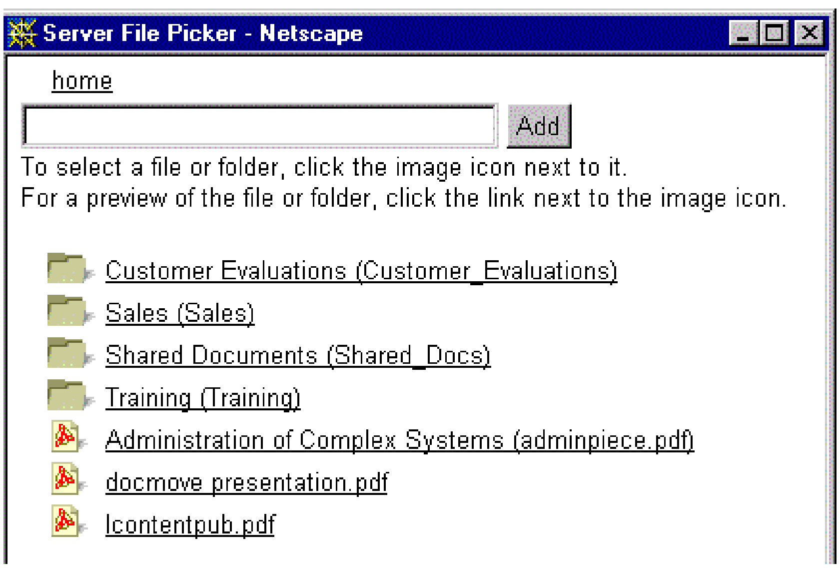
Files must first be uploaded to a separate location on the InfoPortal before they can be put in the Shared Documents folder.

(This feature is not available to Account Managers.)

1. In the Side Navigation Bar, click on the Add Shared Folder link.
   - The Shared Documents screen displays:

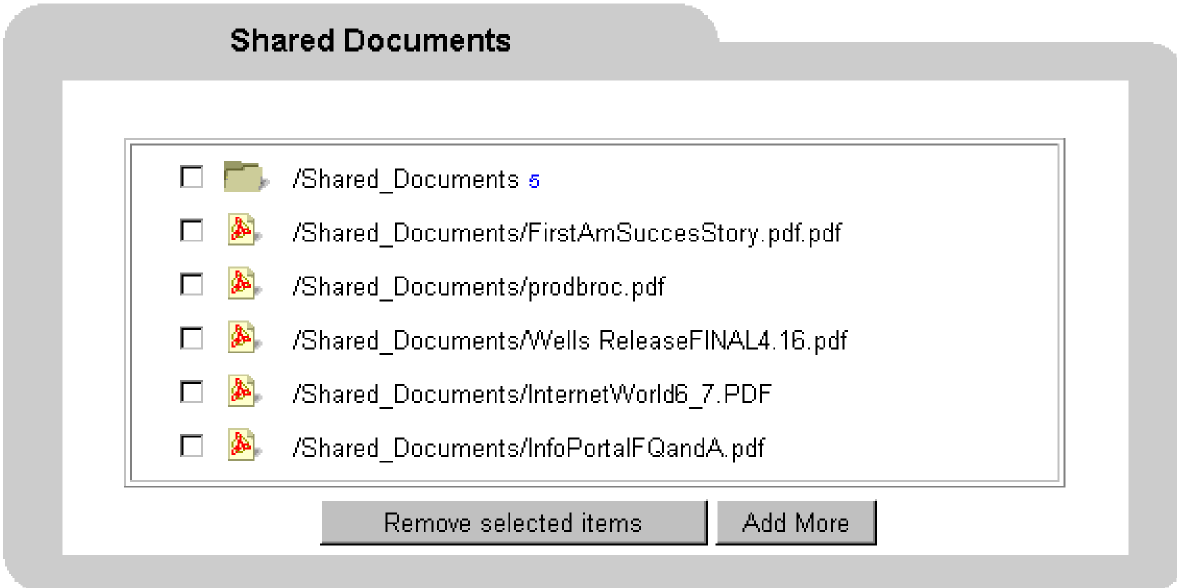


2. Click on the Add More button.
   - The Server File Picker window displays:



3. Click on the file icon to select it. If the file is located within a category folder, click on the folder title link to display its contents, then click on the file icon.
   - The filename displays in the text box.
   - Clicking on the title link displays the contents of the file.
4. Click on the Add button.
   - A link to the file is put into the Shared Documents folder.

5. Repeat Steps Step 3 and Step 4 until all files are added.
6. Click on the close box ☒ to close the Server File Picker window.
   - The Shared Documents screen displays the filenames you selected:

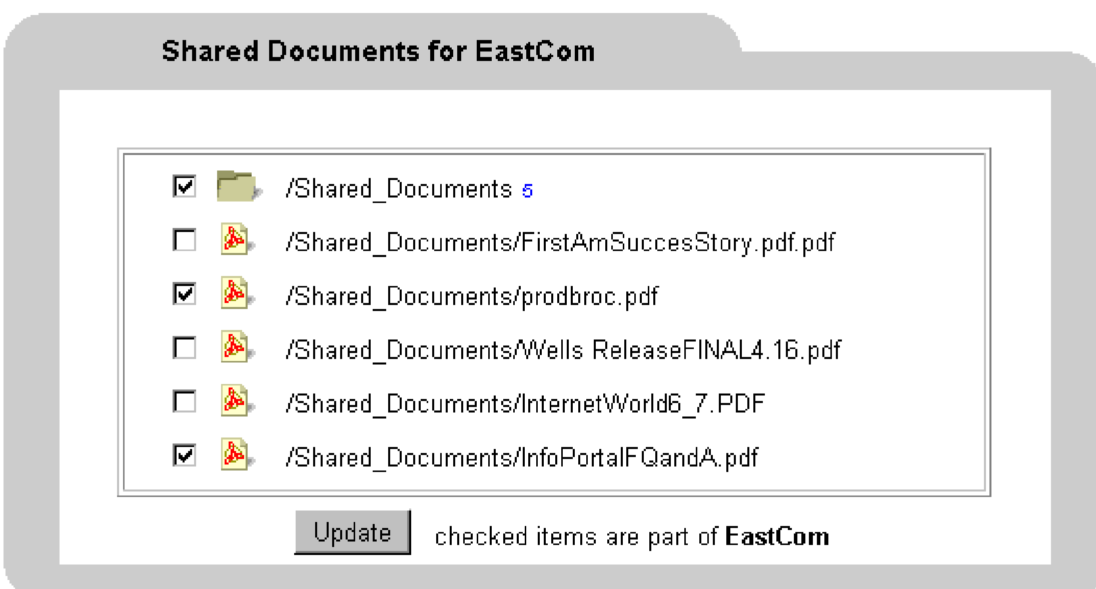


Removing Shared Documents

Once removed, Extranet users will no longer see the document filename in the Shared Documents folder on the InfoPortal. This procedure removes only the link in the Shared Documents folder on the InfoPortal. It does not remove the document from its location on the server.

(This feature is not available to Account Managers.)

1. Navigate to the Shared Documents folder.
   - The Shared Documents screen displays:

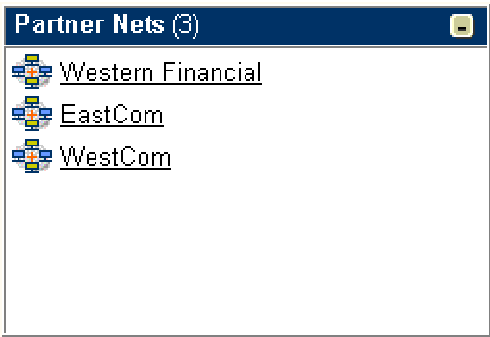


2. Click in the check box to the left of each filename that you want to remove from shared access.
   - The check mark is removed from the check box.
3. Click on the Update button.
   - The document is removed from view for that Extranet.

Editing the Extranet Setup

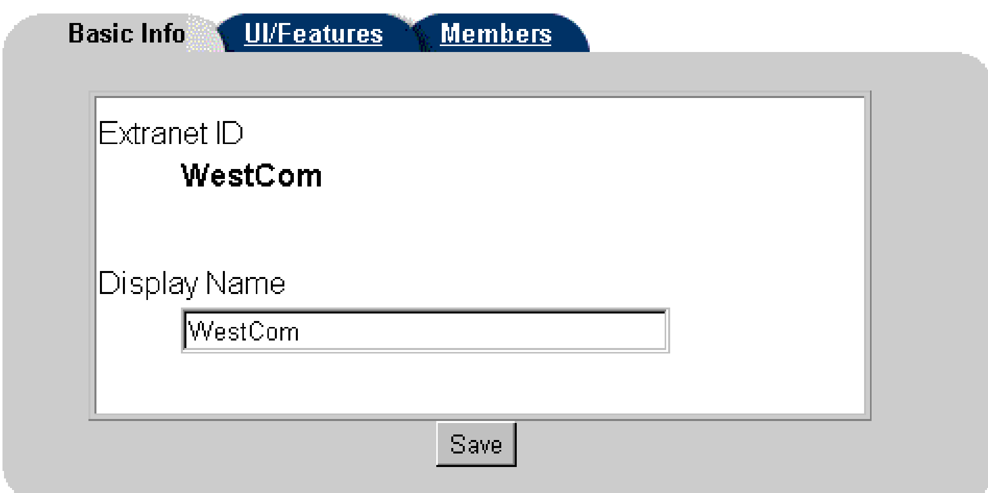
Account Administrators/Managers use the Edit/Details function to change the Extranet Display Name, select a different theme for User Interface features, and change the Users and Groups that have access to the Extranet. The Extranet ID, once created, cannot be changed.

1. From the Account Administration/Management view, follow the instructions in “Finding an Extranet,” page 5.20 to access the Extranet information.
   - You can also click on the link for the Extranet Name in the Partner Nets window of the My Portal view:



2. In the Side Navigation Bar, click on the Edit menu triangle to expand it.

3. Click on the Details link.
   - The Basic Info tab of the Create Extranet screen displays:

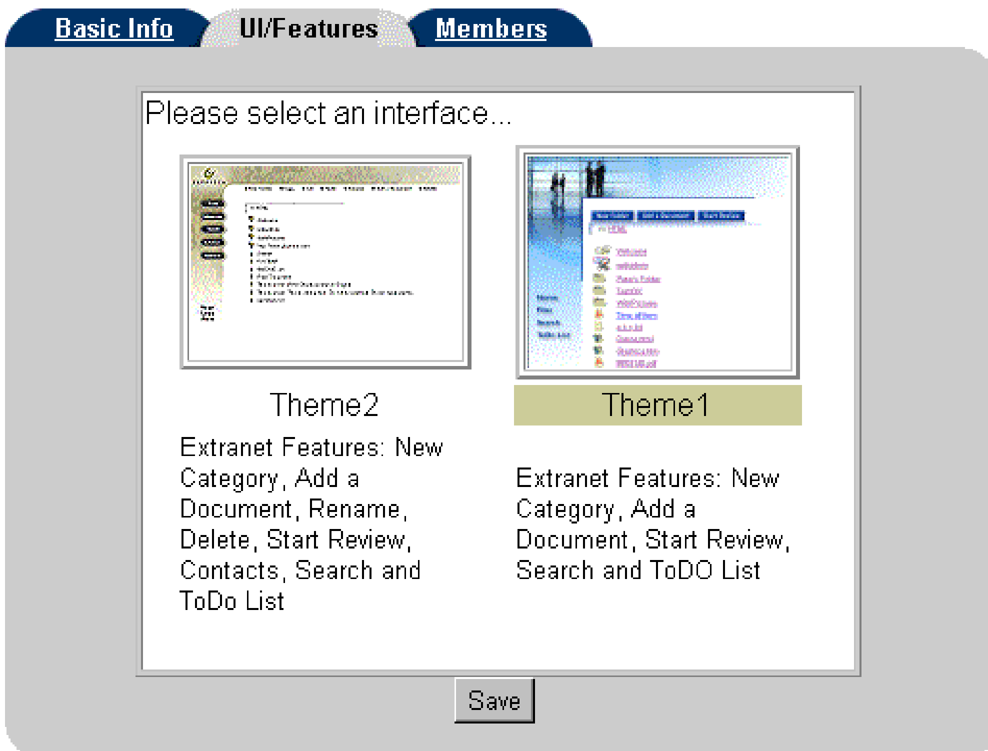


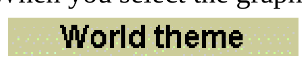
Changing the Extranet Display Name

1. To change the Display Name, highlight the text in the Display Name field
2. Enter the new name.
3. Click on the Save button.

Changing the User Interface Theme

1. To select a different theme, click on the UI/Features tab in the Create Extranet screen.
   - The UI/Features screen displays:



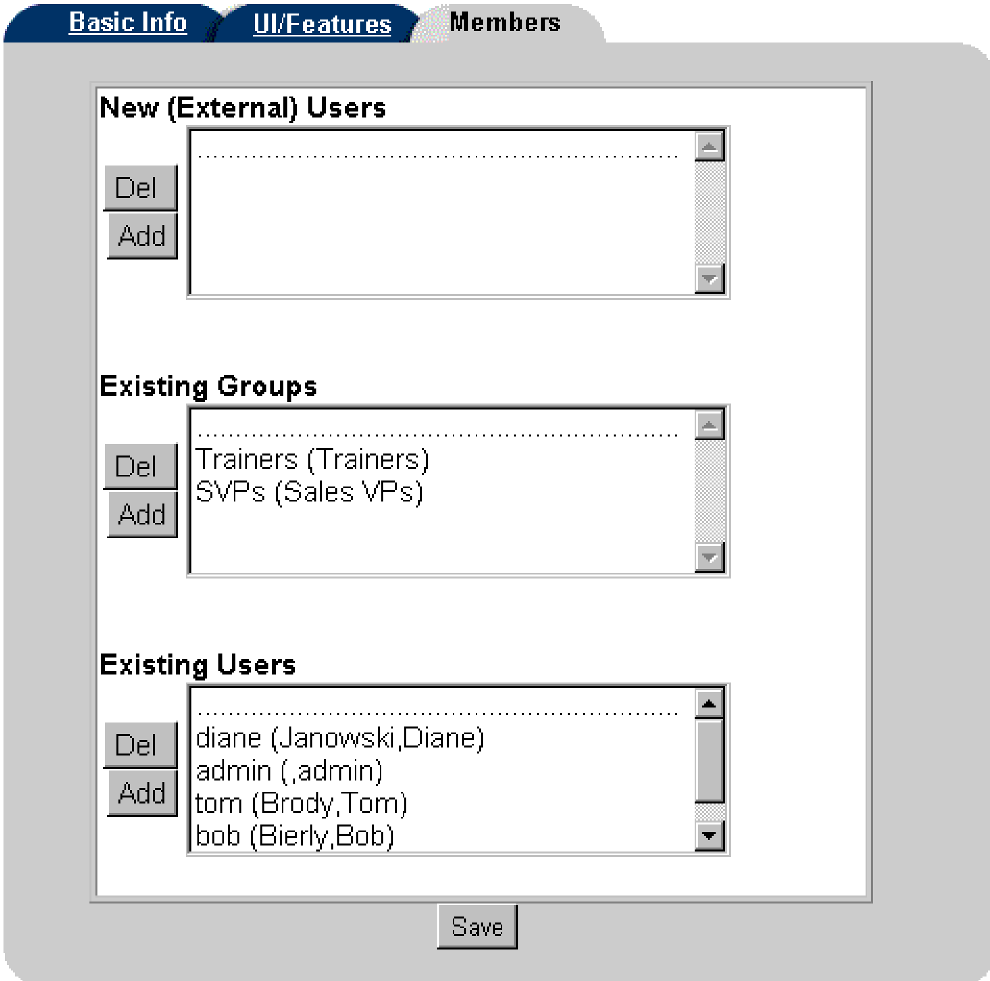
2. Click on the appropriate graphic to select Theme 1 or Theme 2.
   - A list of features included in each theme is listed below the graphic to help you make your choice. When you select the graphic, the theme title highlights to show it is selected: 

3. Click on the Save button.

Changing Extranet Users and Groups

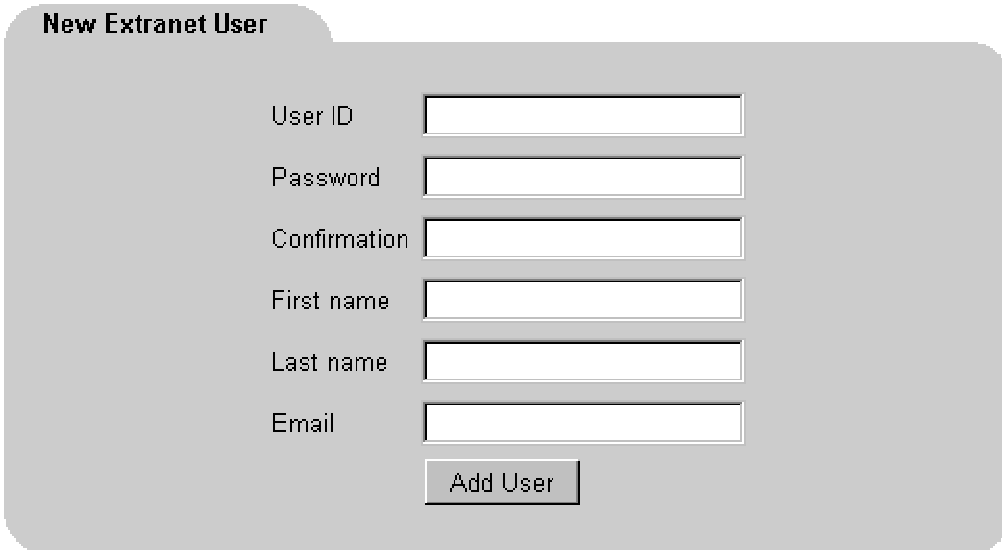
1. To change the users and/or groups that have access to the Extranet, click on the Members tab in the Create Extranet screen.

- The Members screen displays:

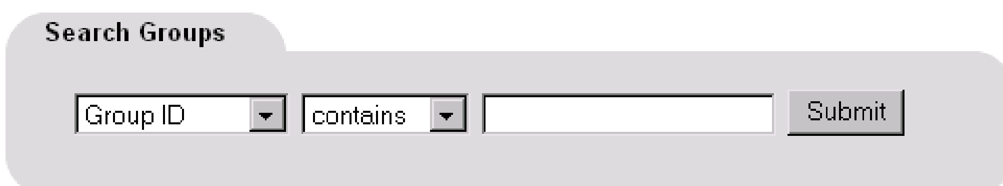


2. If you wish to add a new user to this Extranet (one that does not already exist in the system), click on the Add button under New (External) Users.

- The New Extranet User screen displays in a separate window:

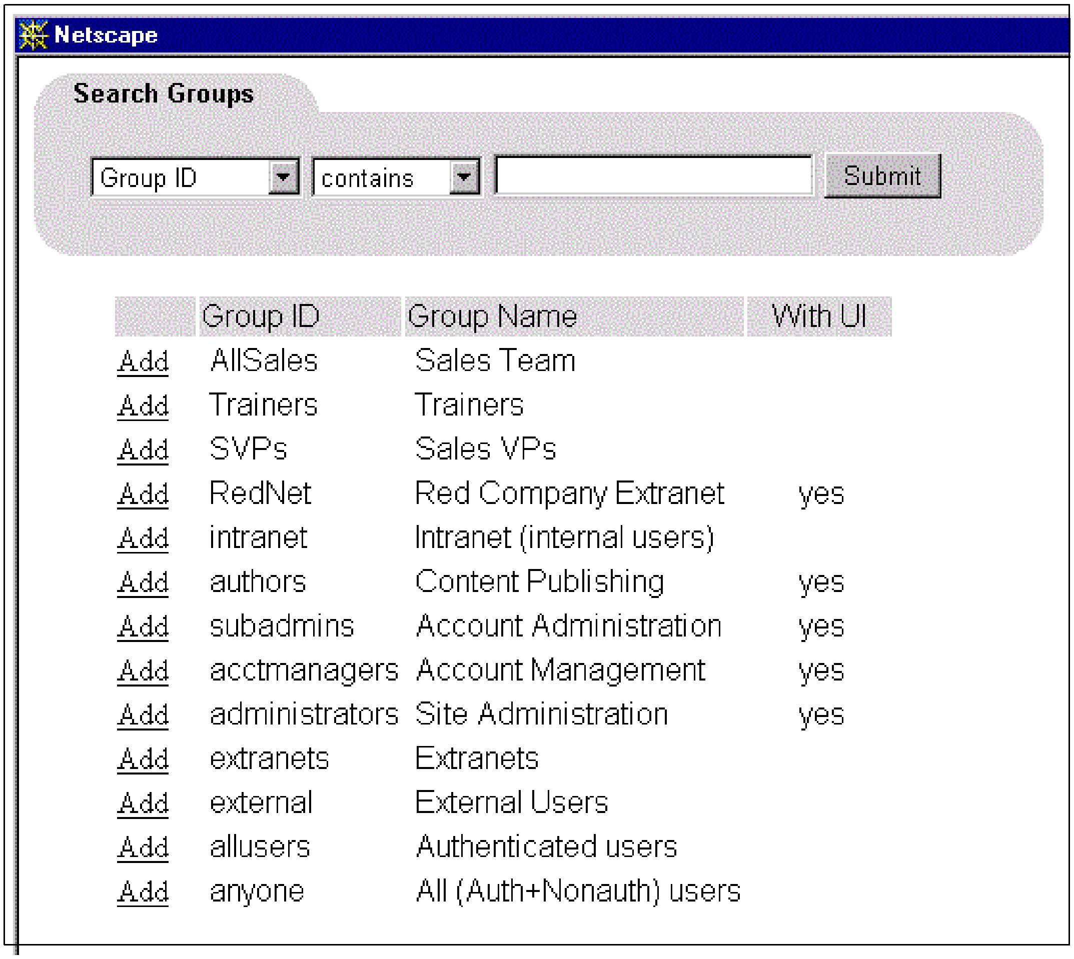


3. Enter the user information in the appropriate fields.
4. Click on the Add User button.
5. Repeat Steps Step 3 and Step 4 for each new user.
6. Click on the close box to close the New Extranet User window.
   - The user names display in the New (External) Users list in the Members tab.
7. If you want to add one or more existing groups as members of the Extranet, click on the Add button under Existing Groups.
   - The Search Groups screen displays in a separate window:

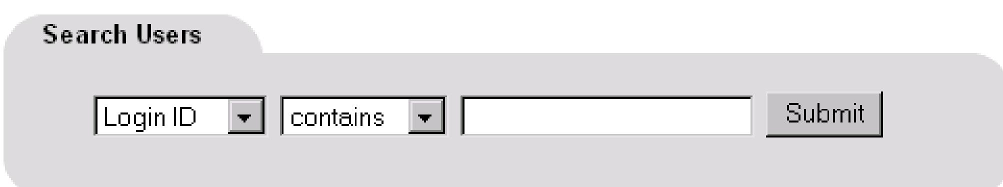


8. Enter your search criteria.
9. Click on the Submit button.

- The search results display:

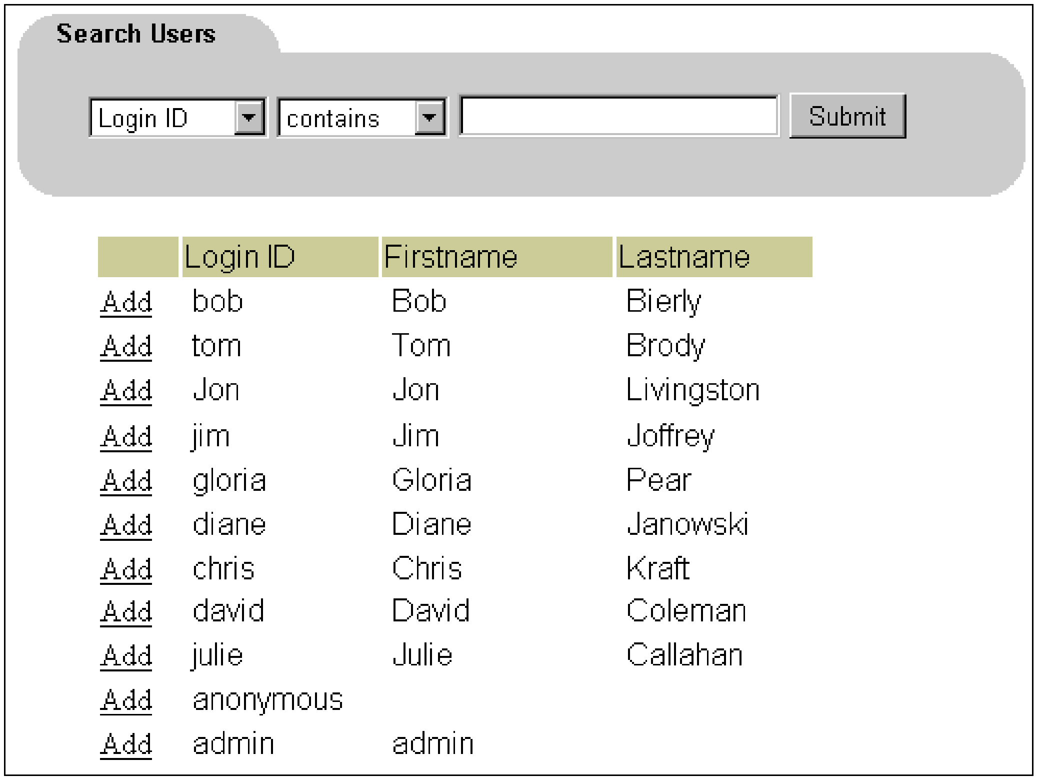


10. Click on the Add link for each user you want to add.
11. Click on the close box to close the Search Groups window.
    - The group names display in the Existing Groups list for the Extranet.
12. If you want to add one or more existing users as members of the Extranet, click on the Add button under Existing Users.
    - The Search Users screen displays in a separate window:



13. Enter your search criteria.
14. Click on the Submit button.

- The search results display:



	Login ID	Firstname	Lastname
Add	bob	Bob	Bierly
Add	tom	Tom	Brody
Add	Jon	Jon	Livingston
Add	jim	Jim	Joffrey
Add	gloria	Gloria	Pear
Add	diane	Diane	Janowski
Add	chris	Chris	Kraft
Add	david	David	Coleman
Add	julie	Julie	Callahan
Add	anonymous		
Add	admin	admin	

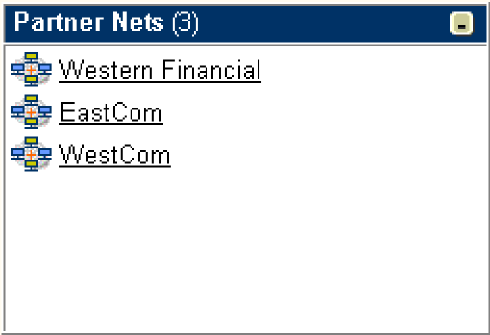
15. Click on the Add link for each user you want to add.
16. Click on the close box to close the Search Users window.
    - The user names display in the Existing Users list for the Extranet.
17. If you want to delete a user, click on the name in the Existing Users list.
18. Click on the Del button.
19. Click on the Save button.

Creating an Extranet Banner

This procedure places a banner in the top center of the Extranet screen. The banner can be text and/or an image file. The image file can contain text. The file must be uploaded to the InfoPortal before the Account Administrator/Manager can place it in the Extranet. Text can then be entered below the image; this text can be formatted using HTML tags.

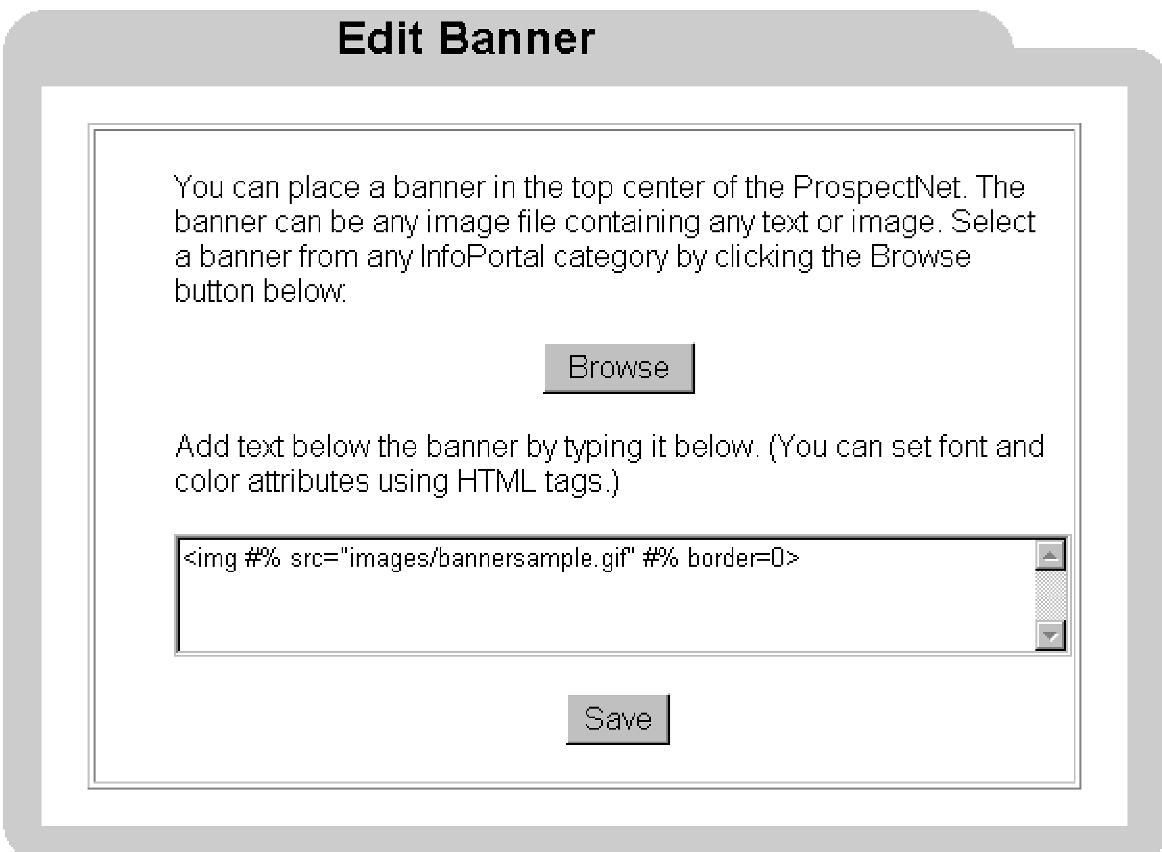
1. From the Account Administration/Management view, follow the instructions in “Finding an Extranet,” page 5.20 to access the Extranet information.

- You can also click on the link for the Extranet Name in the Partner Nets window of the My Portal view:



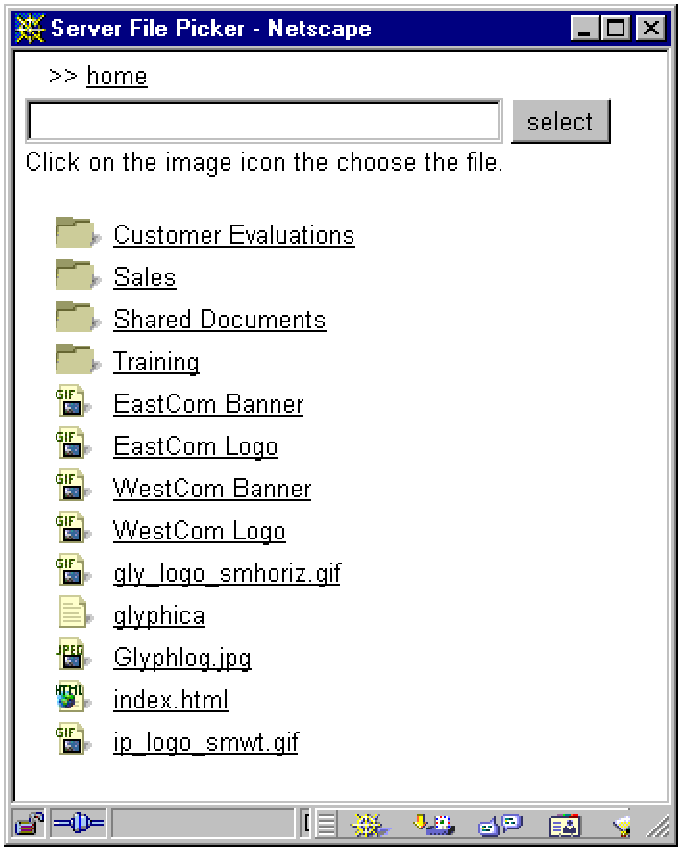
2. In the Side Navigation Bar, click on the Edit menu triangle to expand it.

3. Click on the Banner link.
   - The Edit Banner screen displays:



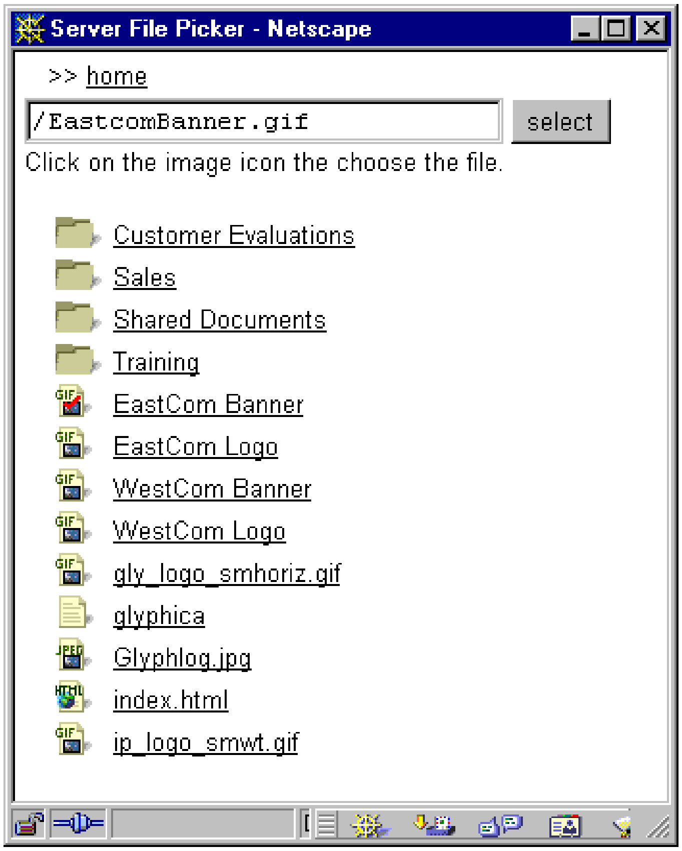
4. Click on the Browse button to select an image file from the InfoPortal.

- The Server File Picker window displays:



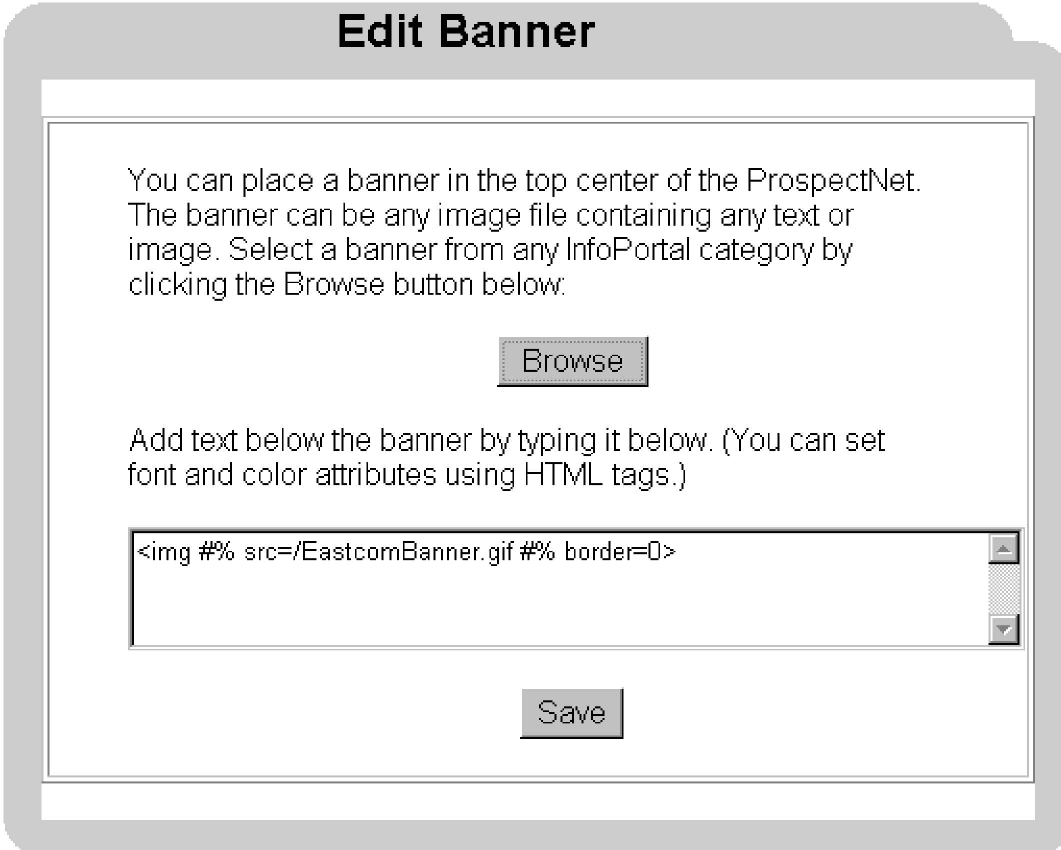
5. Click on the image file icon to select it.
   - Clicking on the title link displays the image.

- The path and filename display in the text box at the top of the Server File Picker window.

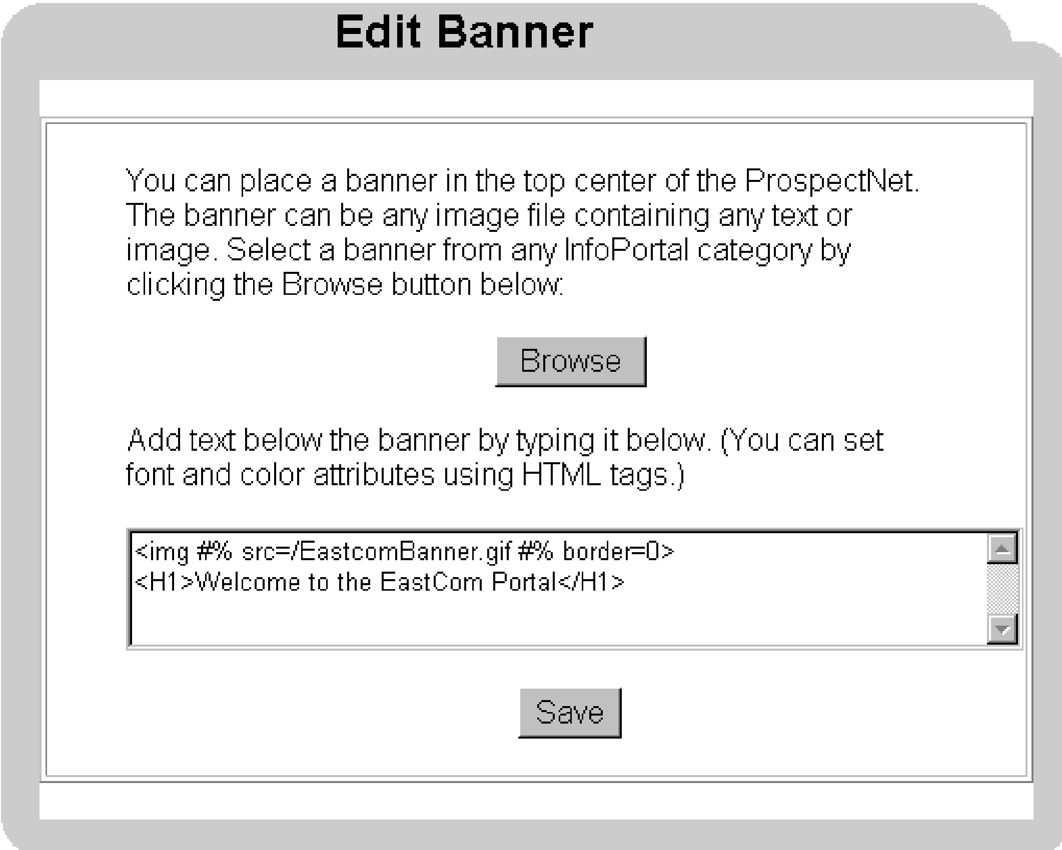


6. Click on the Select button.

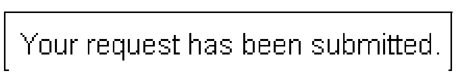
- The path and filename display in the text box at the bottom of the Edit Banner screen.



7. To add text below the banner image (or to use text only instead of an image), enter the text in the text box at the bottom of the Edit Banner screen. Enclose this text in HTML tags to get the appropriate formatting.



8. Click on the Save button.
   - A confirmation message displays:

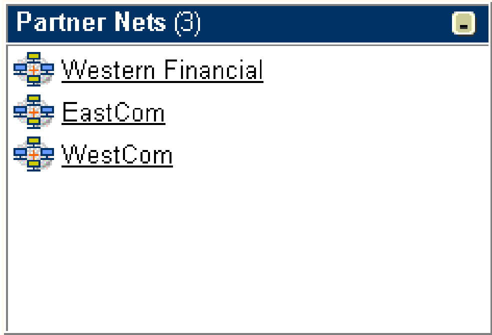


Modifying the Extranet Banner

This procedure changes the existing banner text and/or image that has been placed in an Extranet.

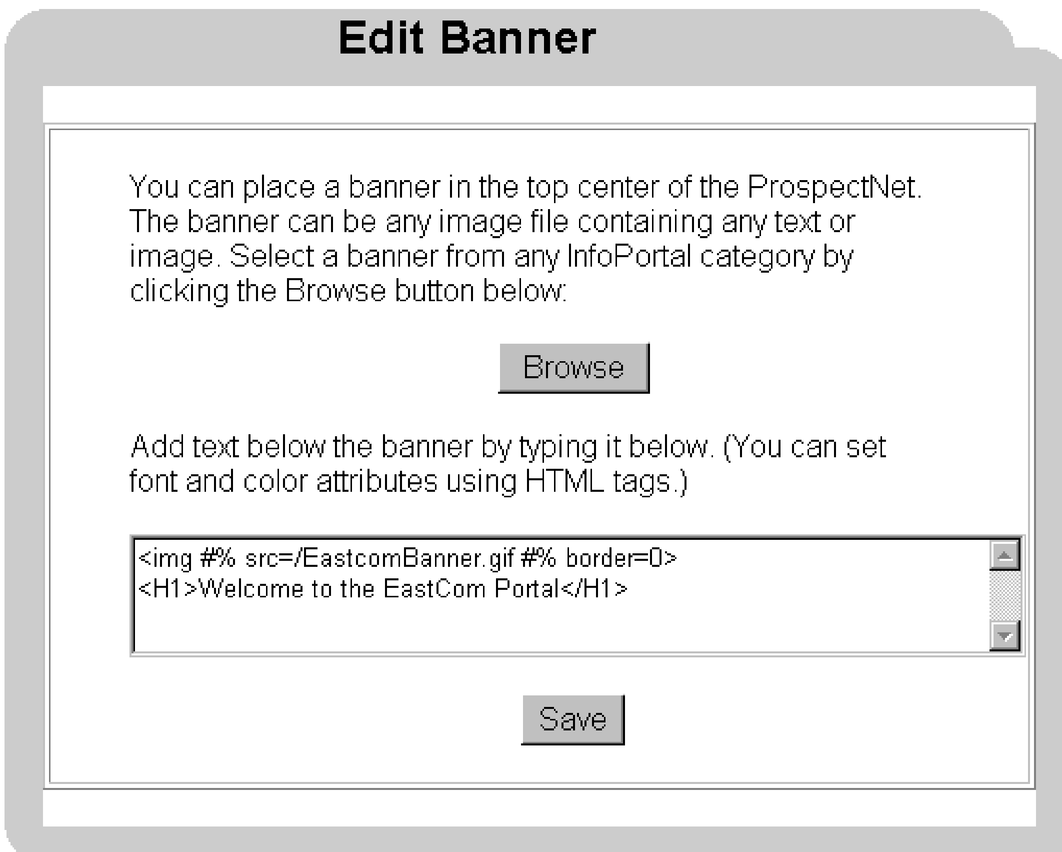
1. From the Account Administration/Management view, follow the instructions in “Finding an Extranet,” page 5.20 to access the Extranet information.

- You can also click on the link for the Extranet Name in the Partner Nets window of the My Portal view:



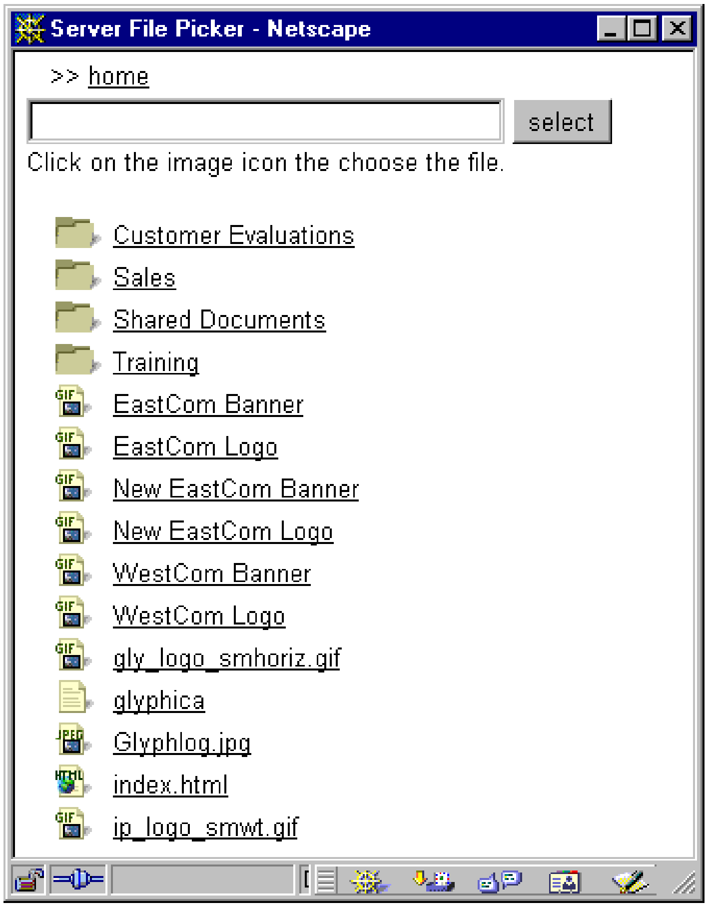
2. In the Side Navigation Bar, click on the Edit menu triangle to expand it.

3. Click on the Details link.
   - The Edit Banner screen displays:



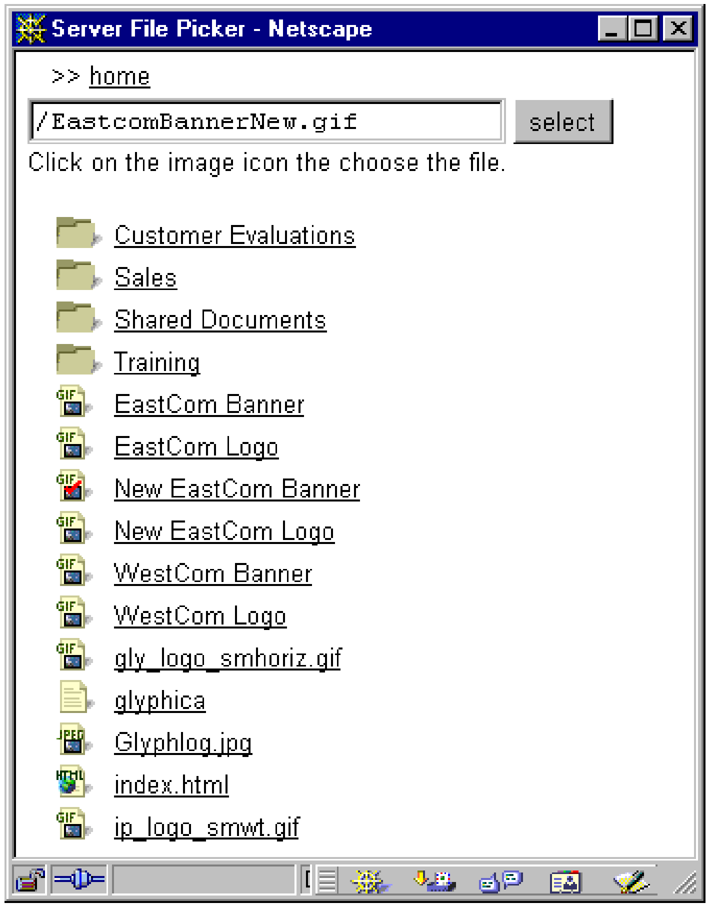
4. If you want to select a different image file, click on the Browse button.

- The Server File Picker window displays:



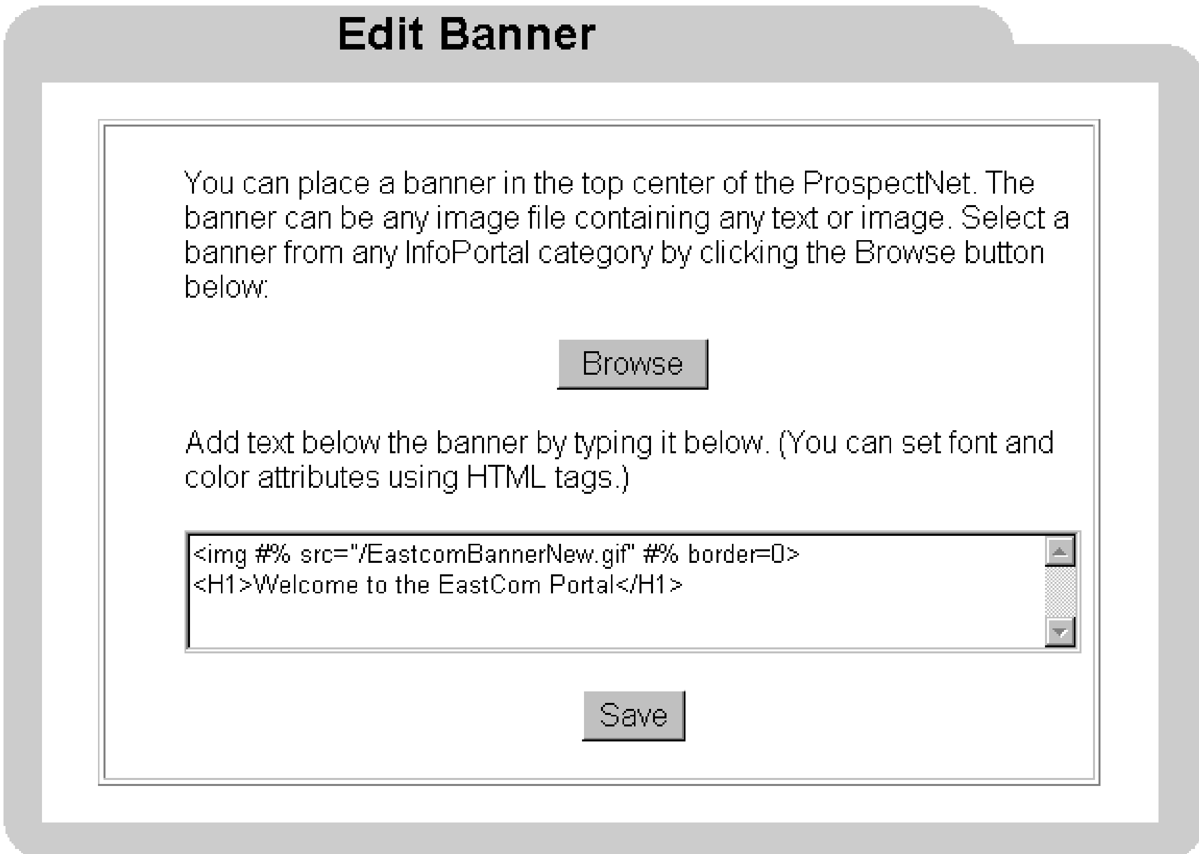
5. Select the image file.

- The path and filename display in the text box at the top of the Server File Picker window.

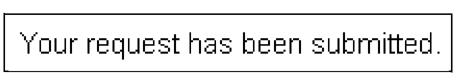


6. Click on the Select button.

- The new path and filename display in the text box at the bottom of the Edit Banner screen:



7. If you want to change the HTML text and/or formatting, highlight the appropriate part in the text box at the bottom of the Edit Banner screen.
8. Make the appropriate changes.
9. Click on the Save button.
    - A confirmation message displays:

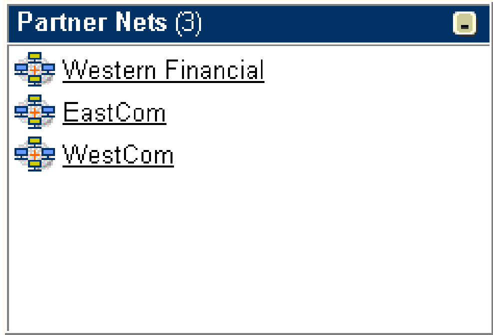


Edit News

This procedure adds a text message to the Extranet home screen. Users see this screen when they first log on to the Extranet. The message defaults to normal text, but the Account Administrator/Manager can format it using HTML tags.

1. From the Account Administration/Management view, follow the instructions in “Finding an Extranet,” page 5.20 to access the Extranet information.

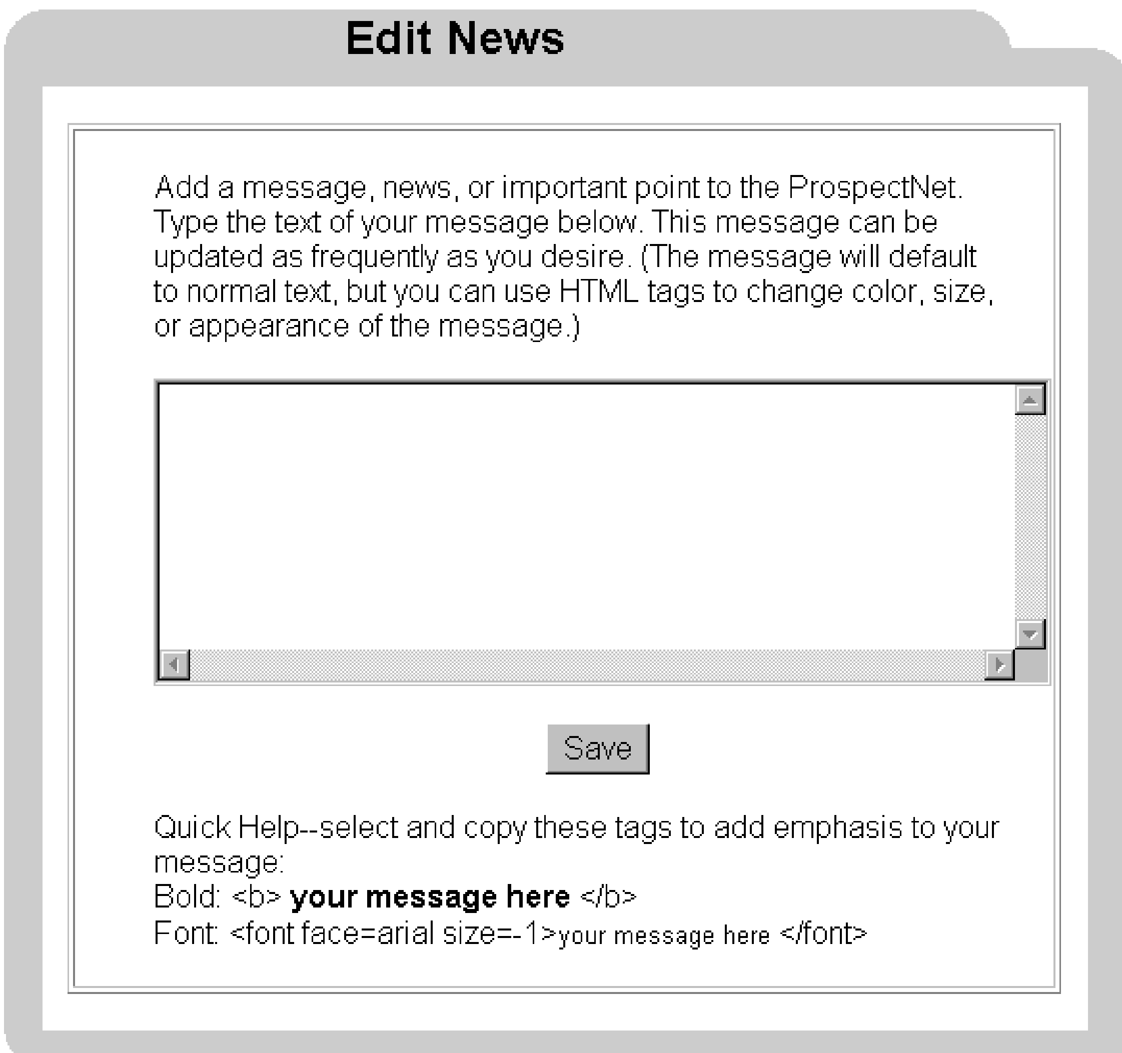
- You can also click on the link for the Extranet Name in the Partner Nets window of the My Portal view:



2. In the Side Navigation Bar, click on the Edit menu triangle to expand it.

3. Click on the News link.

The Edit News screen displays:

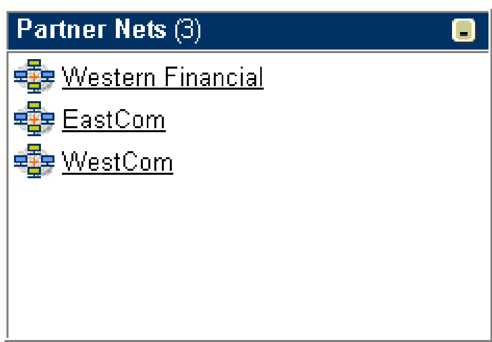


4. Enter text in the text box at the bottom of the Edit Banner screen. Enclose this text in HTML tags to get the appropriate formatting.
5. Click on the Save button.
   - A confirmation message displays:

Adding a Logo to the Extranet

The Account Administrator/Manager can add a company logo to the Extranet. This logo will display in the upper right-hand corner of all Extranet pages. The logo file can be either GIF or JPEG format. The size limit is 50 pixels high. There seems to be a pixel width limit as well; what is it? The logo file can be located either on a local hard drive or on the InfoPortal.

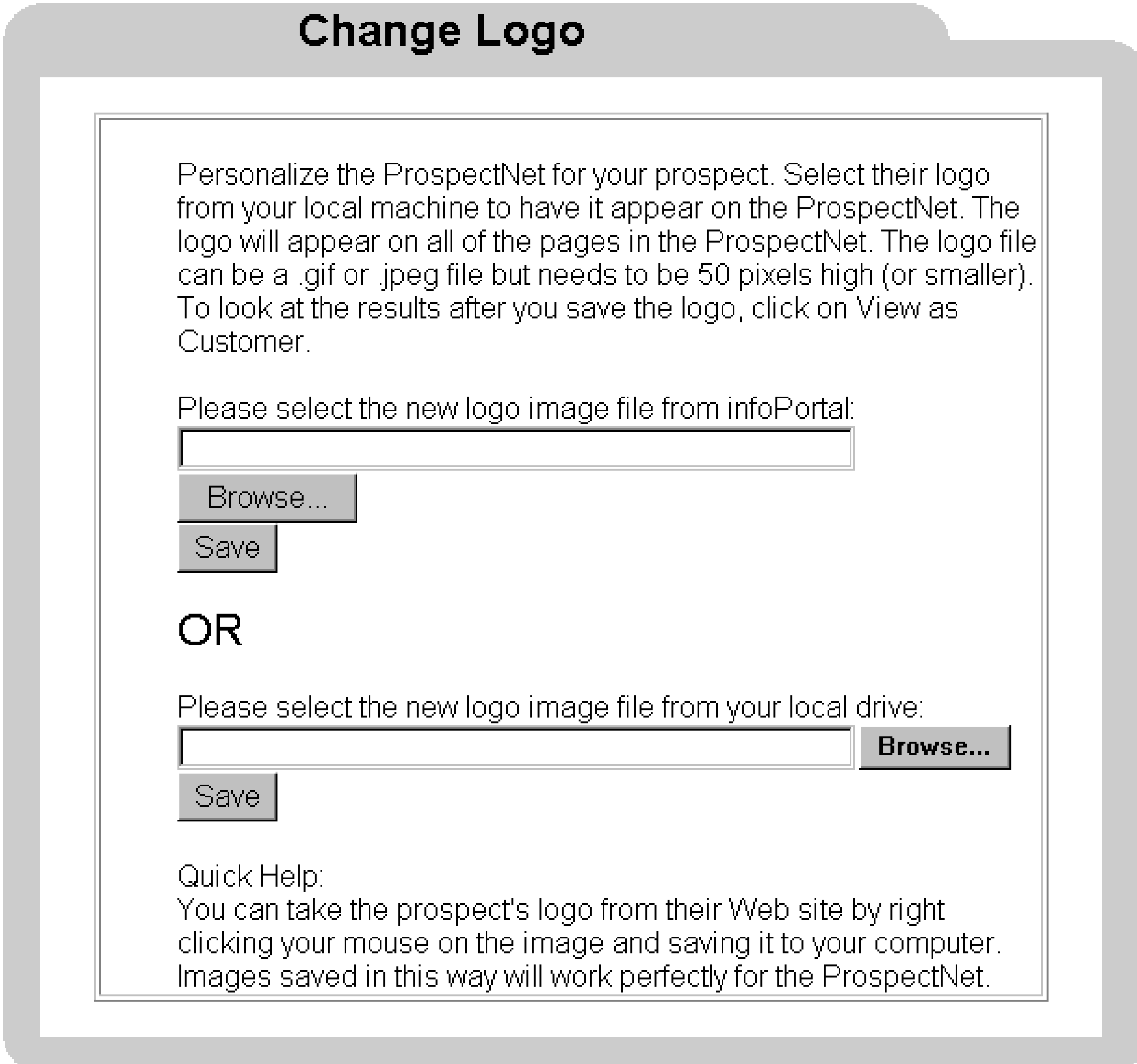
1. From the Account Administration/Management view, follow the instructions in “Finding an Extranet,” page 5.20 to access the Extranet information.
   - You can also click on the link for the Extranet Name in the Partner Nets window of the My Portal view:



2. In the Side Navigation Bar, click on the Edit menu triangle to expand it.

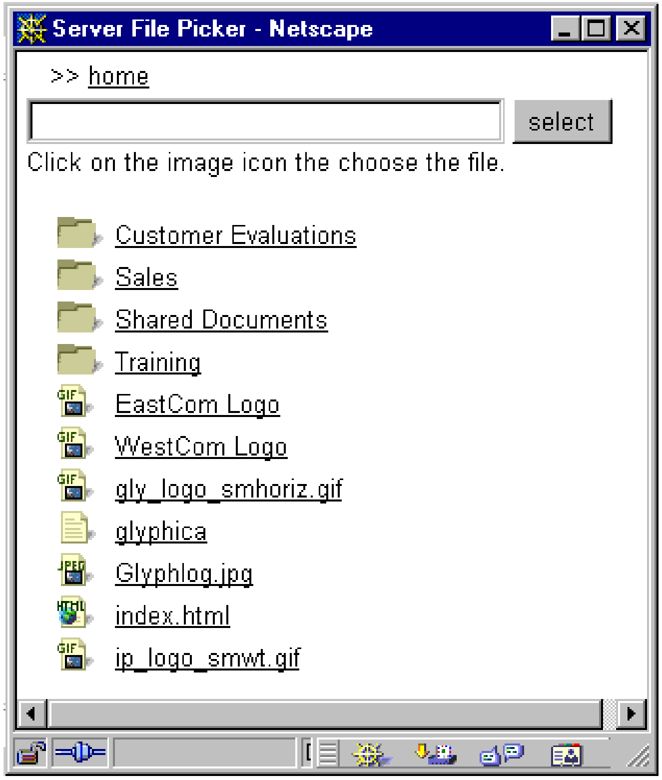
3. Click on the Logo link.

- The Change Logo screen displays:

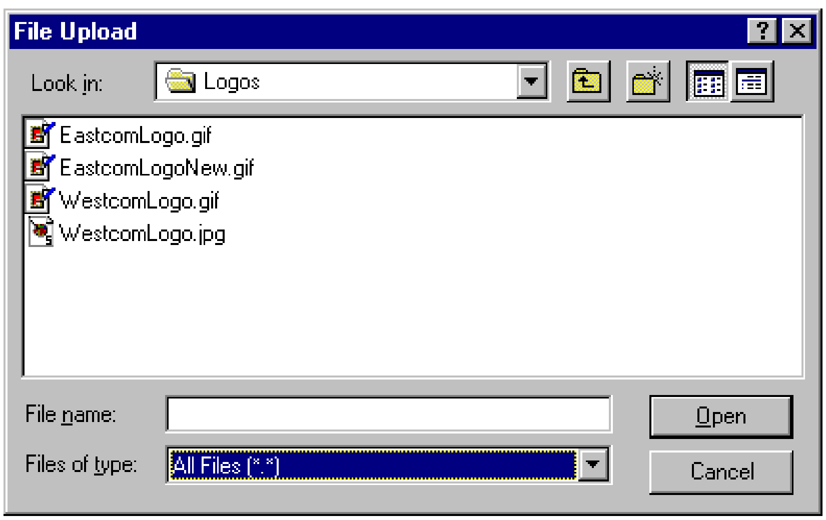


4. Click on the appropriate Browse button, depending on whether you want to select the logo file from the InfoPortal or from your local hard drive.

- If you are selecting from the InfoPortal, the Server File Picker window displays:

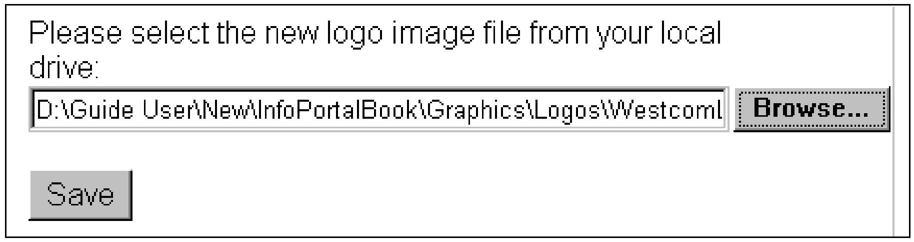


- If you are selecting from your local hard drive, the File Upload window displays:



5. Select the logo file.
6. Click on the Select button in the Server File Picker window; click on the Open button in the File Upload window.

- The path and filename display in the appropriate text box of the Change Logo screen:

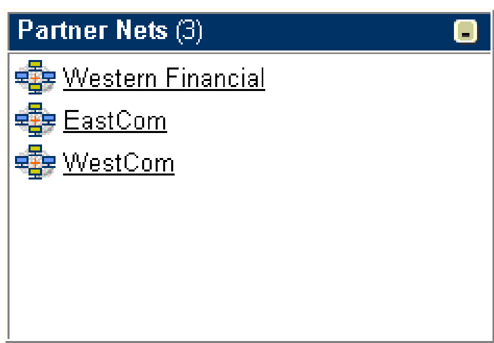


7. Click on the Save button that is below the text box where the path and filename display.
   - A confirmation message displays:

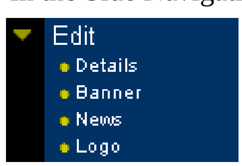
Changing the Extranet Logo

This procedure changes the image file that displays in the upper right-hand corner of all Extranet pages.

1. From the Account Administration/Management view, follow the instructions in “Finding an Extranet,” page 5.20 to access the Extranet information.
   - You can also click on the link for the Extranet Name in the Partner Nets window of the My Portal view:

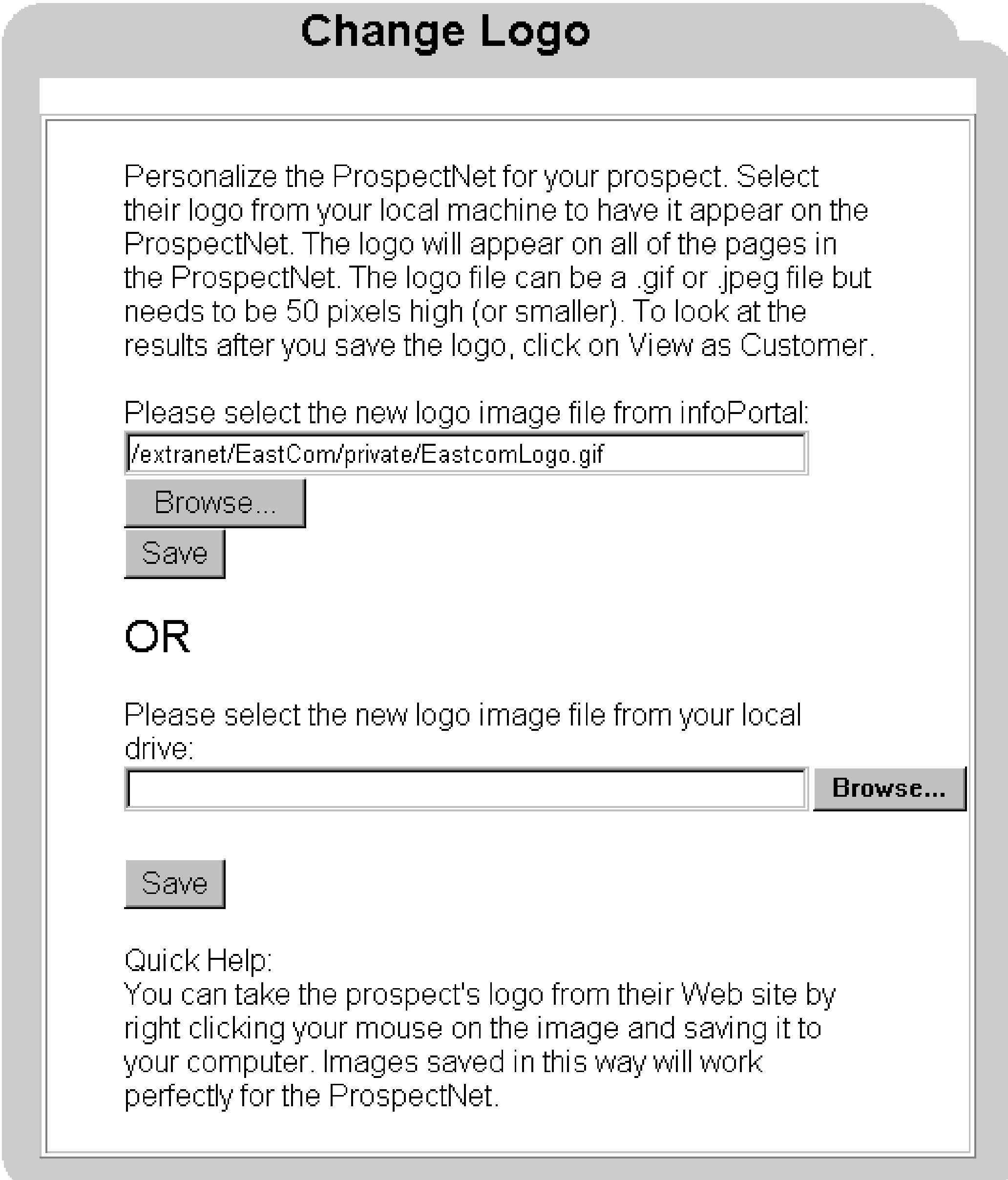


2. In the Side Navigation Bar, click on the Edit menu triangle to expand it.



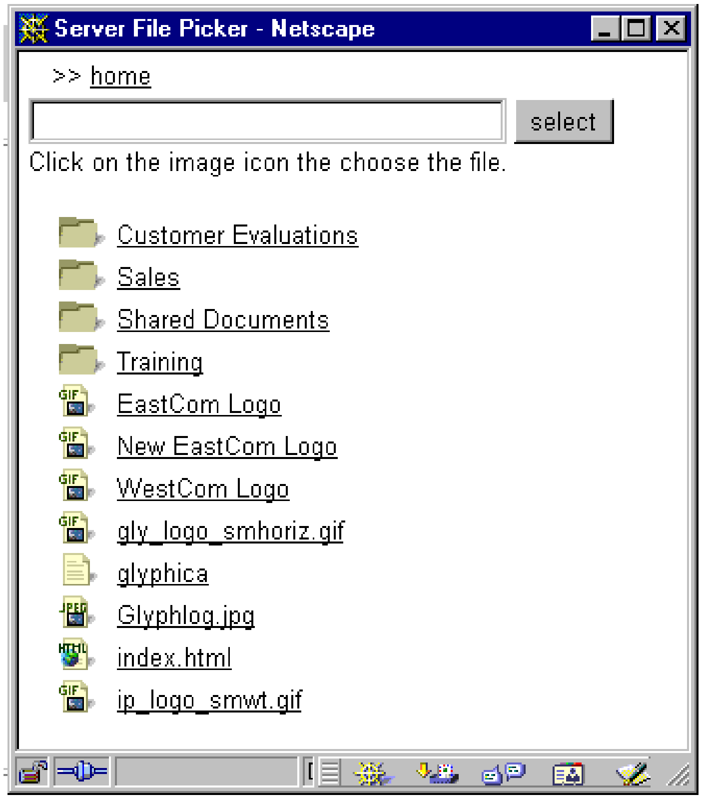
3. Click on the Logo link.

- The Change Logo screen displays:

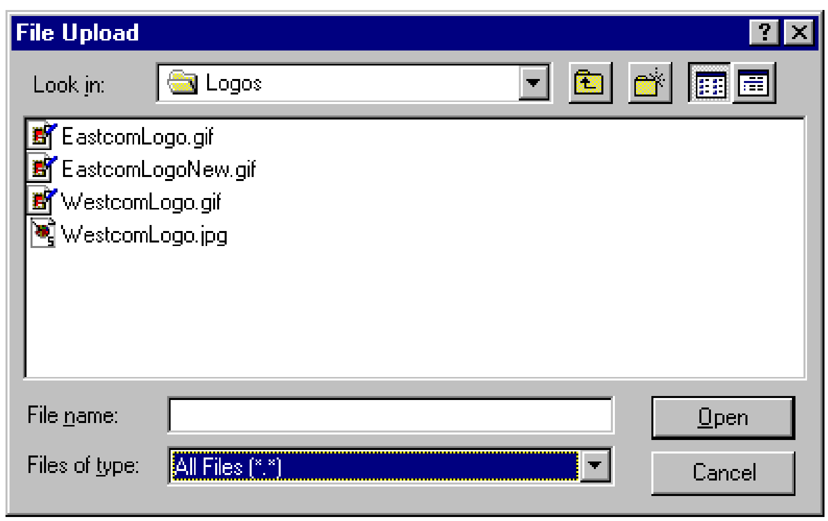


4. Click on the appropriate Browse button, depending on whether you want to select the logo file from the InfoPortal or from your local hard drive.

- If you are selecting from the InfoPortal, the Server File Picker window displays:

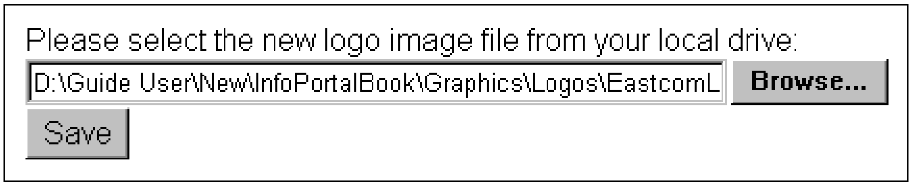


- If you are selecting from your local hard drive, the File Upload window displays:



5. Select the logo file.
6. Click on the Select button in the Server File Picker window; click on the Open button in the File Upload window.

- The path and filename display in the appropriate text box of the Change Logo screen:

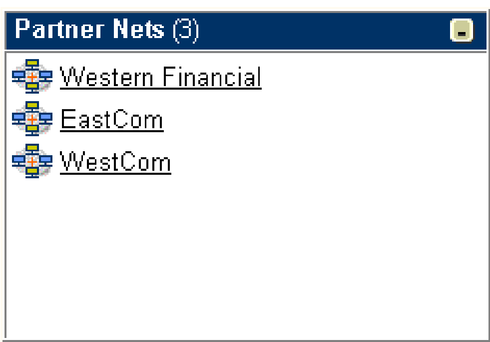


7. Click on the Save button that is below the text box where the path and filename display.
   - A confirmation message displays:

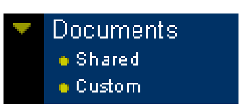
Sharing Documents

The Account Administrator/Manager can select InfoPortal documents to be shared with all the Extranets on the InfoPortal. This procedure selects documents already in the Shared Documents folder so that your Extranet users can access them. (To add documents to the folder, see “Creating a Shared Documents Folder,” page 5.23.) This feature saves time and space, since the files to be shared are uploaded only once to a central folder, rather than to separate folders on each Extranet.

1. From the Account Administration/Management view, follow the instructions in “Finding an Extranet,” page 5.20 to access the Extranet information.
   - You can also click on the link for the Extranet Name in the Partner Nets window of the My Portal view:



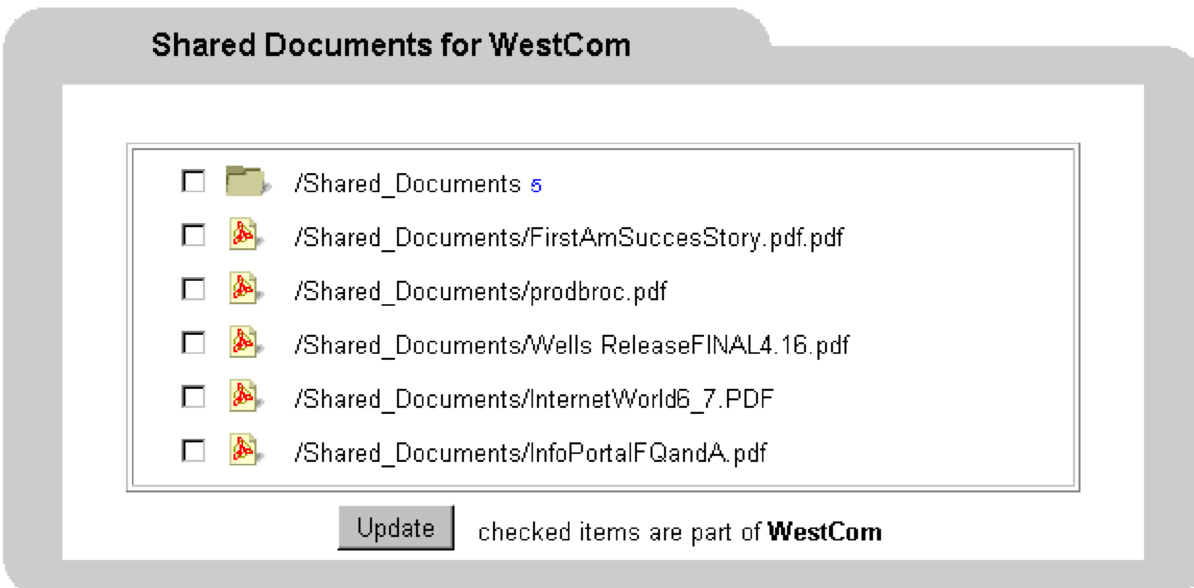
2. In the Side Navigation Bar, click on the Documents menu triangle to expand it.



3. Click on the Shared link.

- The Shared Documents screen displays. If no documents have been put in the Shared Documents folder, the screen looks like this:

- To add documents to the folder, see “Creating a Shared Documents Folder,” page 5.23.
- If documents have been put in the Shared Documents folder, the screen looks like this:



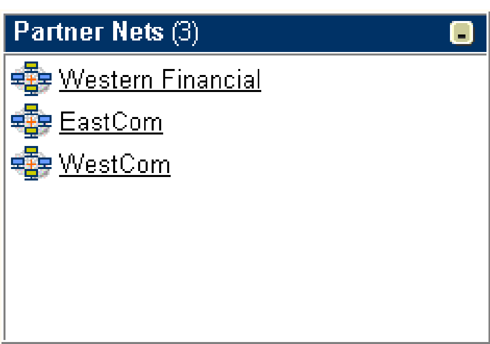
4. Click in the check box to the left of the Shared Documents folder if you want the entire folder’s contents to be seen by your Extranet users. Otherwise, click in the check box to the left of each document you want them to see.
5. Click on the Update button.

- When users log onto the Extranet, they will see links to these shared documents in a window:

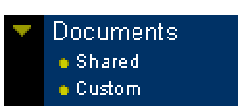
Custom Documents

The Account Administrator/Manager can select InfoPortal documents that are seen only by the users of a specific Extranet. This procedure places documents into a private folder so that only the Extranet users can access them.

1. From the Account Administration/Management view, follow the instructions in “Finding an Extranet,” page 5.20 to access the Extranet information.
   - You can also click on the link for the Extranet Name in the Partner Nets window of the My Portal view:



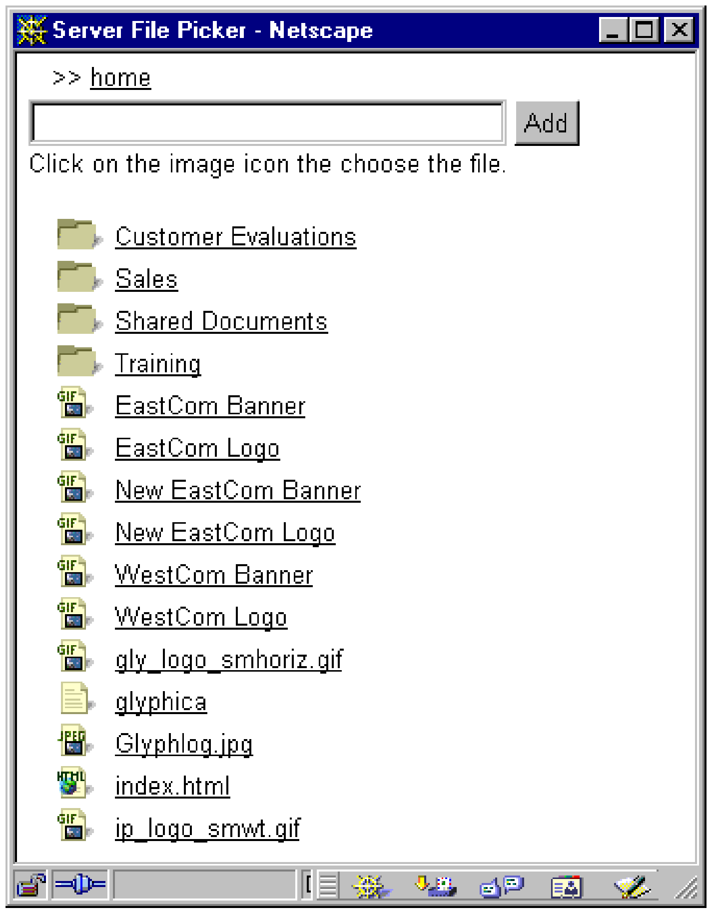
2. In the Side Navigation Bar, click on the Documents menu triangle to expand it.



3. Click on the Custom link.

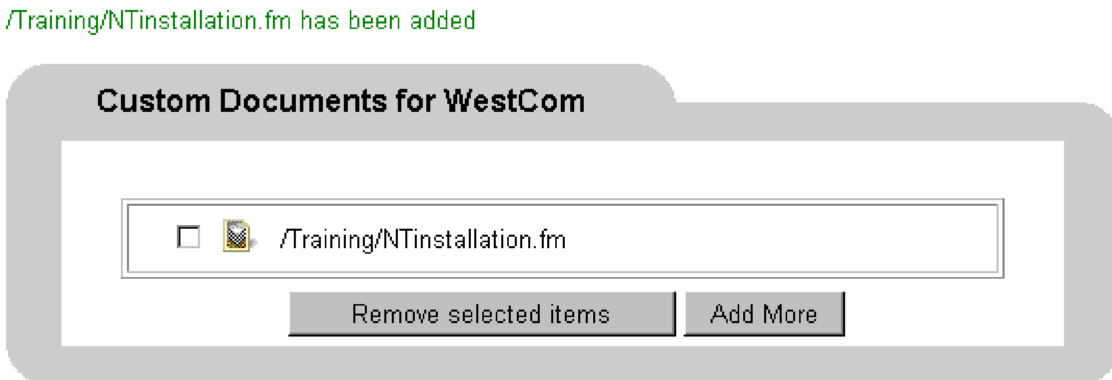
- The Custom Documents screen displays:

4. Click on the Add More button.
   - The Server File Picker window displays:



5. Click on the file icon to select it. If the file is located within a category folder, click on the folder title link to display its contents, then click on the file icon.
   - The filename displays in the text box.
   - Clicking on the title link displays the contents of the file.
6. Click on the Add button.
   - A link to the file is put into the Shared Documents folder.
7. Repeat Steps Step 5 and Step 6 until all files are added.
8. Click on the close box ☒ to close the Server File Picker window.

- The filename displays in the Custom Documents screen and a confirmation message displays above the screen.



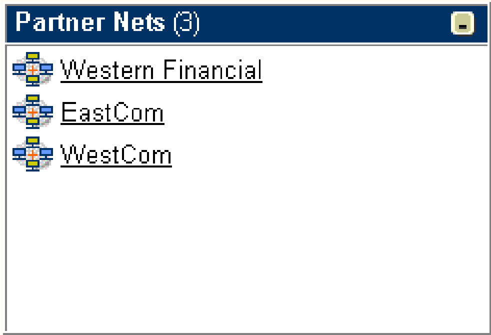
- When users log onto the Extranet, they will see links to the document in a window:

Viewing the Extranet Directory

This procedure displays the Extranet's file and folder directory structure. It is the same as the Content Publisher List view (see "Content Publishing Content Area," page 3.11). Each Extranet has a private folder that contains files used solely by that Extranet, such as logo, news, and banner files.

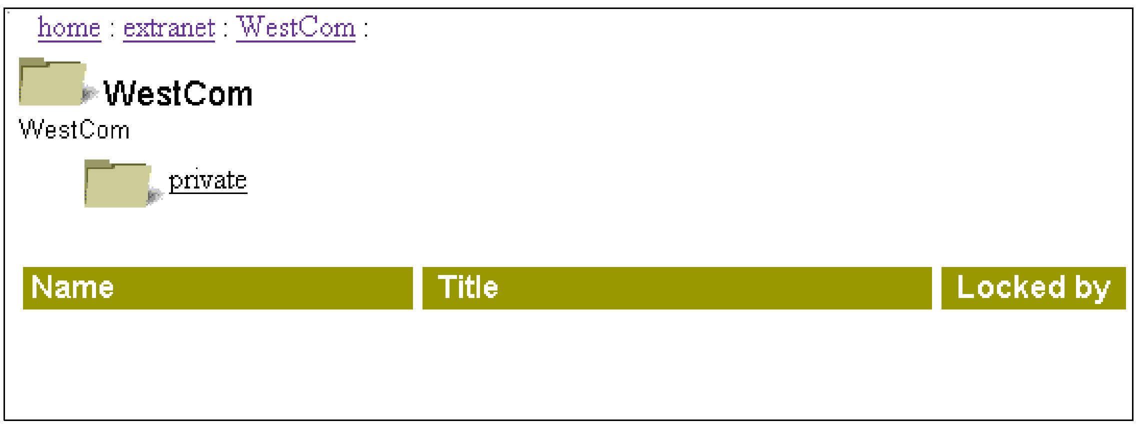
1. From the Account Administration/Management view, follow the instructions in "Finding an Extranet," page 5.20 to access the Extranet information.

- You can also click on the link for the Extranet Name in the Partner Nets window of the My Portal view:



2. In the Side Navigation Bar, click on the View As menu triangle to expand it.

3. Click on the Manager link.
   - The Extranet Directory screen displays:

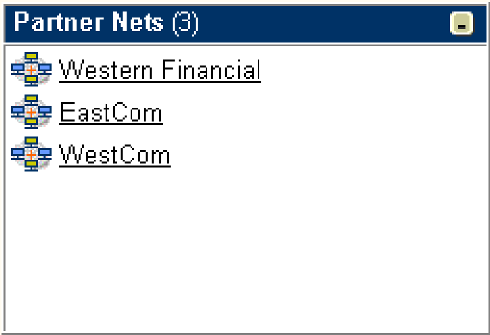


View as Customer

This procedure displays a graphical view of the Extranet. This shows exactly what external users will see when they log in to the Extranet.

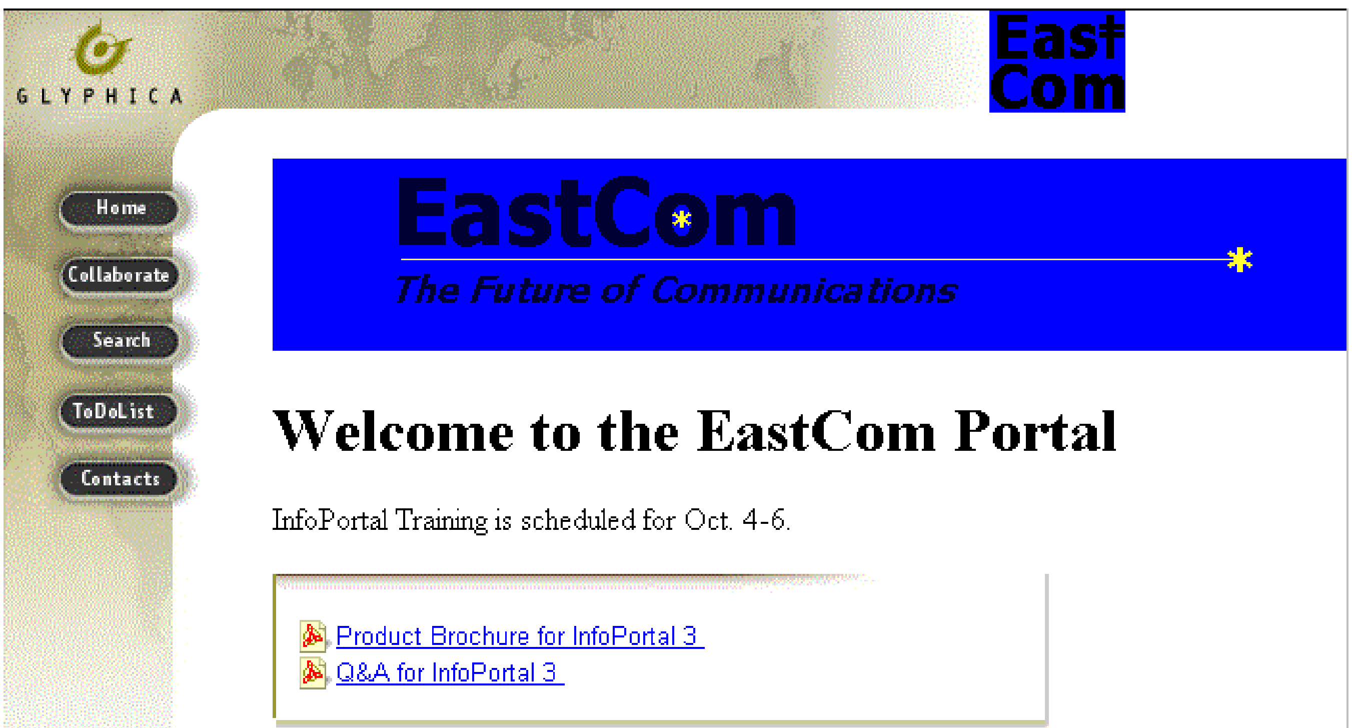
1. From the Account Administration/Management view, follow the instructions in “Finding an Extranet,” page 5.20 to access the Extranet information.

- You can also click on the link for the Extranet Name in the Partner Nets window of the My Portal view:



2. In the Side Navigation Bar, click on the View As menu triangle to expand it.

3. Click on the Customer link.
   - The Extranet Home Page displays:

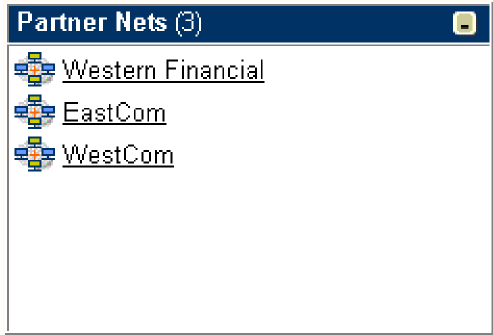


Monitoring Extranet Activity

This procedure displays a screen from which the Account Administrator/Manager can view the creation and modification statistics for the Extranet. By clicking on the Audit View Event button, the Account Administrator/Manager can start/stop entries logged when Extranet documents are being viewed.

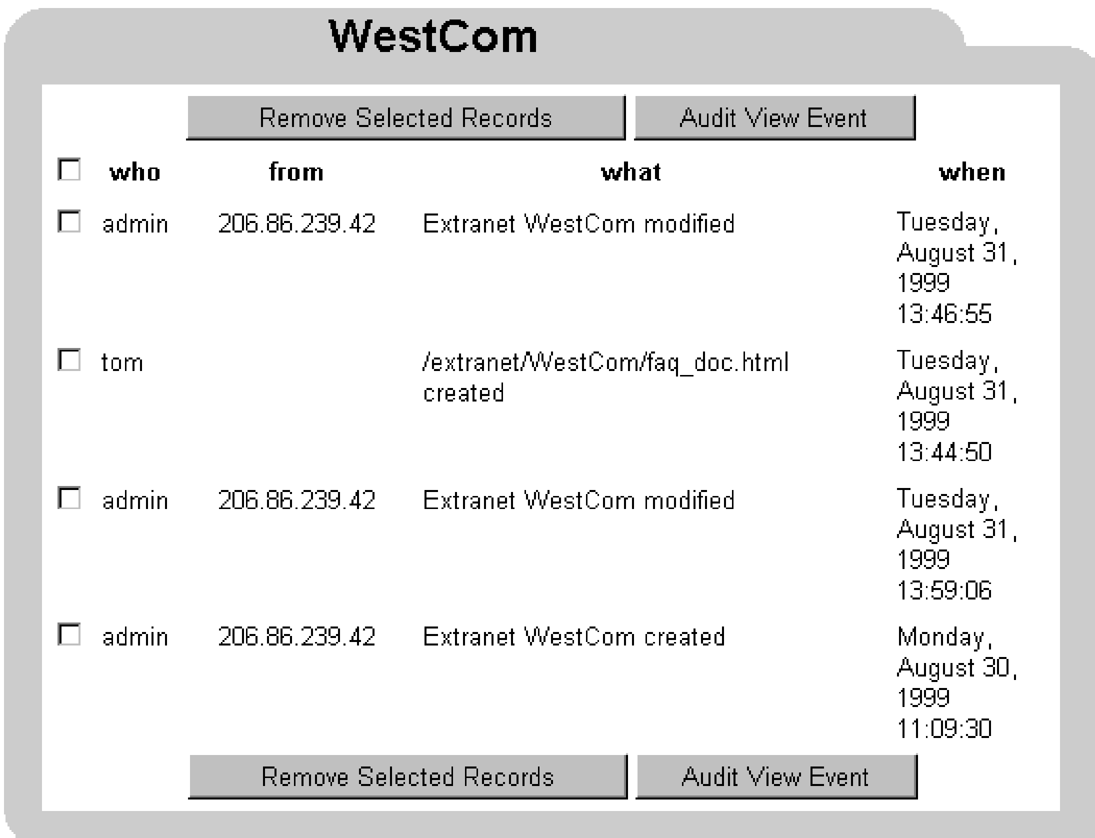
1. From the Account Administration/Management view, follow the instructions in “Finding an Extranet,” page 5.20 to access the Extranet information.

- You can also click on the link for the Extranet Name in the Partner Nets window of the My Portal view:



2. In the Side Navigation Bar, click on the Activity menu.

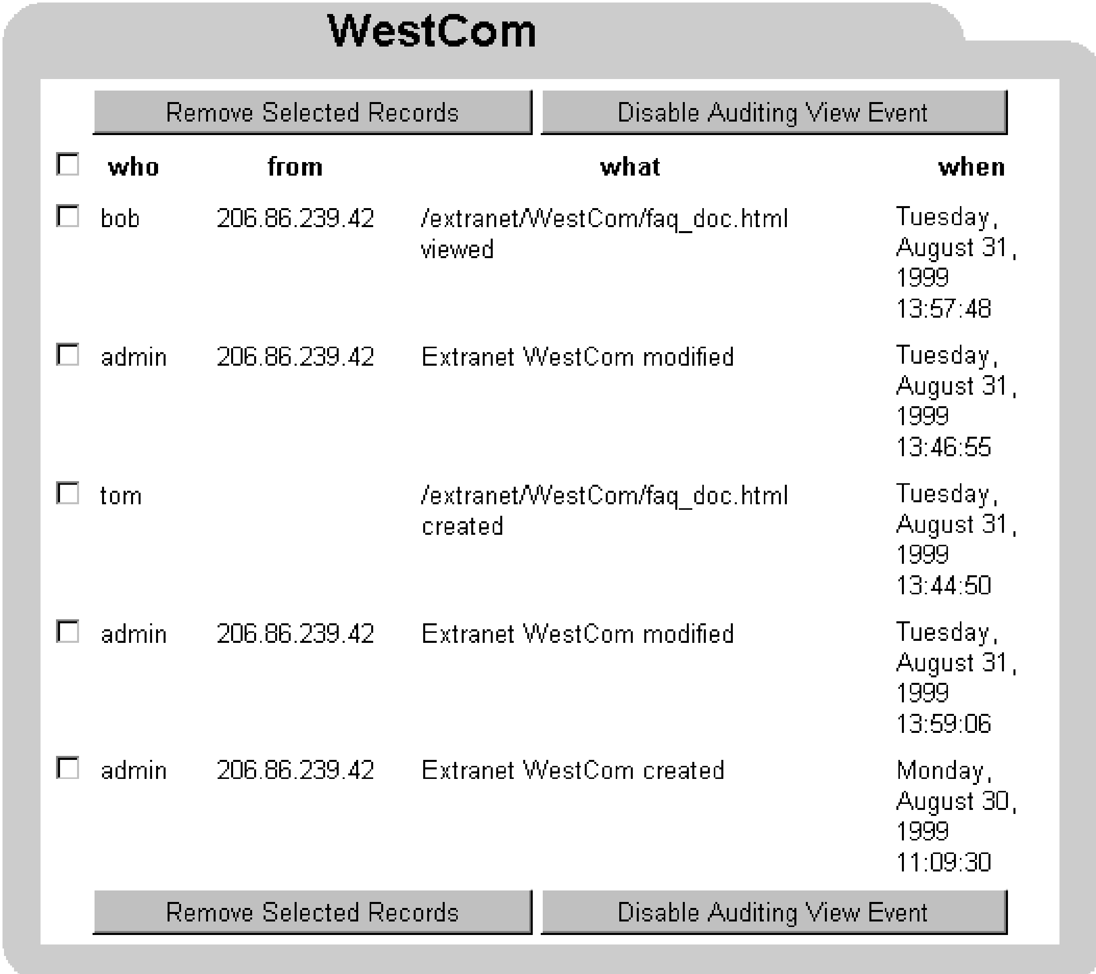
- The Extranet Activity screen displays:



- Event entries are listed with the most recent event displayed first.
- What types of events are displayed?

3. To begin including entries for documents viewed on the Extranet, click on the Audit View Event button.

- The button title changes to Disable Auditing View Event. From that point on, InfoPortal logs statistics when Extranet documents are viewed.


WestCom

Remove Selected Records | Disable Auditing View Event

	who	from	what	when
☐	bob	206.86.239.42	/extranet/WestCom/faq_doc.html viewed	Tuesday, August 31, 1999 13:57:48
☐	admin	206.86.239.42	Extranet WestCom modified	Tuesday, August 31, 1999 13:46:55
☐	tom		/extranet/WestCom/faq_doc.html created	Tuesday, August 31, 1999 13:44:50
☐	admin	206.86.239.42	Extranet WestCom modified	Tuesday, August 31, 1999 13:59:06
☐	admin	206.86.239.42	Extranet WestCom created	Monday, August 30, 1999 11:09:30

Remove Selected Records | Disable Auditing View Event

- InfoPortal does **not** log a view event when:
  - A shared document is viewed
  - A Discussion Group is opened
  - A Mailbox is opened

4. To stop logging view events, click on the Disable Auditing View Event button.
5. To remove records from the log, click in the check box to the left of each entry you wish to delete.
6. Click on the Remove Selected Records button.
   - The records are removed from the screen. Is this removal permanent?

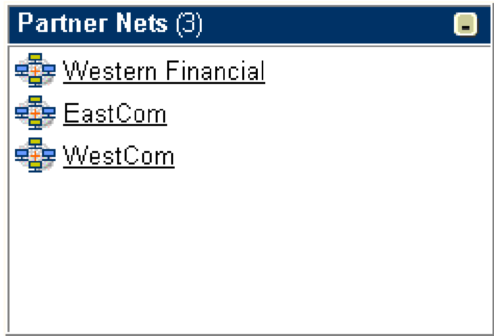
Removing an Extranet

This procedure allows the Account Administrator to remove an existing Extranet from the system. This removes all files for the selected Extranet in the InfoPortal Extranet directory.

(This feature is not available to Account Managers.)

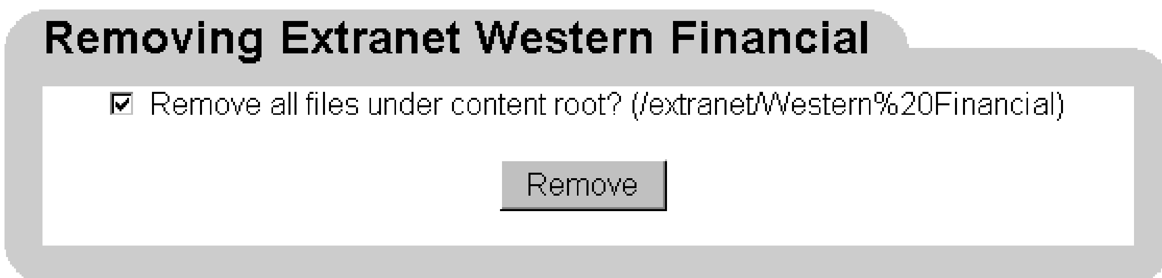
1. From the Account Administration view, follow the instructions in “Finding an Extranet,” page 5.20 to access the Extranet information.

- You can also click on the link for the Extranet Name in the Partner Nets window of the My Portal view:



2. In the Side Navigation Bar, click on the Remove menu.

- The Remove Extranet screen displays:



3. Click on the Remove button.
   - A confirmation message displays:

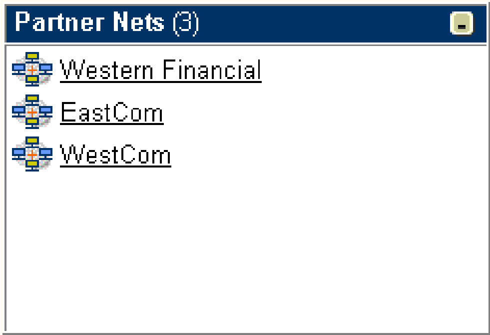
4. Click on the OK button.

Sending Mail to Extranet Members

This procedure lets the Account Administrator/Manager send email messages to the members of an Extranet. The Account Administrator/Manager enters the message text one time, then selects recipients from an automatically-generated list of Extranet members.

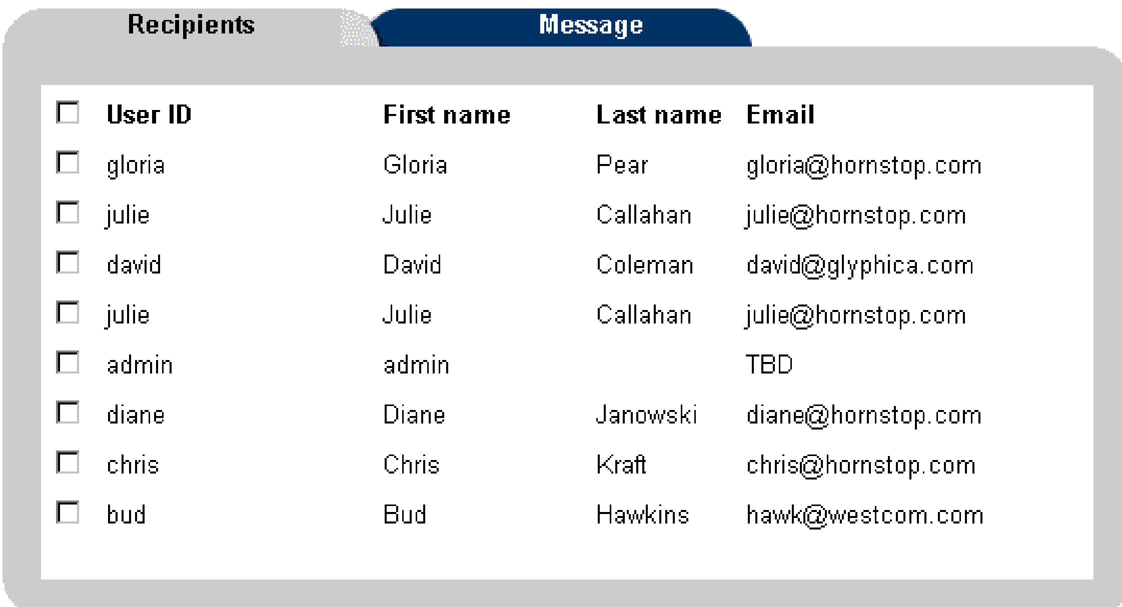
1. From the Account Administration/Management view, follow the instructions in “Finding an Extranet,” page 5.20 to access the Extranet information.

- You can also click on the link for the Extranet Name in the Partner Nets window of the My Portal view:



2. In the Side Navigation Bar, click on the Send Mail menu.

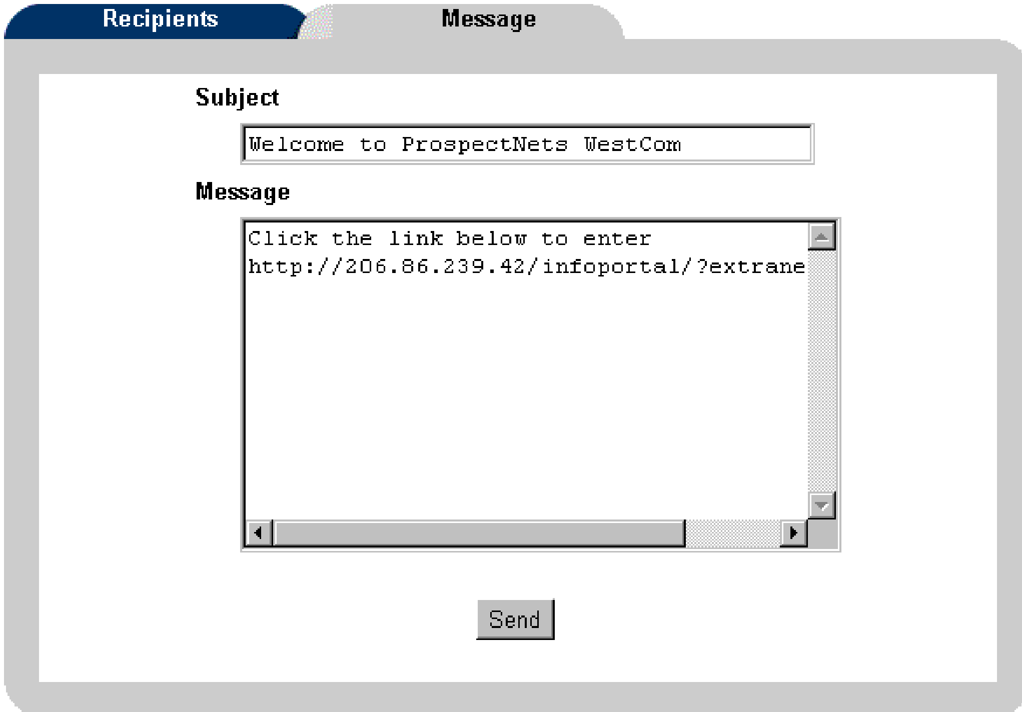
- The list of recipients displays:



User ID	First name	Last name	Email
gloria	Gloria	Pear	gloria@hornstop.com
julie	Julie	Callahan	julie@hornstop.com
david	David	Coleman	david@glyphica.com
julie	Julie	Callahan	julie@hornstop.com
admin	admin		TBD
diane	Diane	Janowski	diane@hornstop.com
chris	Chris	Kraft	chris@hornstop.com
bud	Bud	Hawkins	hawk@westcom.com

3. Click in the check box for each member you to which you want to send your message.
4. Click on the Message tab link.

- The Message tab displays:



5. Enter a subject line in the Subject field.
6. Enter the message text in the Message field.
7. Click on Send.